



Exclaimer Mail Archiver User Manual

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Chapter 1

Getting Started

Mail Archiver Overview

With ever increasing regulatory requirements for electronic communication and high profile cases centered on email evidence, email archiving has never been more important. [Exclaimer Mail Archiver](#) is a simple but scalable solution which takes a fresh approach to email archiving by:

- Drawing upon [Microsoft Exchange journaling functionality](#), ensuring nothing is overlooked [\[pg.9\]](#)
- Using [archiving policies](#) so you can control if and where emails are archived [\[pg.10\]](#)
- Archiving messages to secure, robust, purpose-built [archive stores](#) [\[pg.9\]](#)
- Providing fast, innovative, cross-mailbox [search utilities](#) for desktop computers and web-enabled mobile devices [\[pg.10\]](#)
- Allowing users to [view and manage archived messages](#) [\[pg.10\]](#)

Exchange Journaling

[Microsoft Exchange](#) has built-in functionality for [journaling](#), which takes a copy of all email messages and places the copies into a mailbox that has been designated as a [journaling mailbox](#). When email messages are copied to the [journaling mailbox](#), they are copied in a proprietary format and cannot be changed easily.

[Exclaimer Mail Archiver](#) draws upon this functionality to provide a robust, easily accessible archive of all messages (or defined subsections of email). An [Exclaimer Mail Archiver](#) service polls any [defined Exchange journaling mailboxes](#) [\[pg.220\]](#) continuously, extracts (i.e. removes) messages and pushes them through the [Exclaimer rules engine](#) to determine if and then where they should be archived.

Archive Stores

Archived messages are distributed to [archive stores](#) [\[pg.110\]](#). Different organizations have different requirements - many will archive all incoming and outgoing messages to a single [store](#), whilst others will have more complex requirements - perhaps needing to archive defined subsets of email to different [stores](#). For example, email to and from the company directors, or quotations sent by the Sales team. A [default store](#) is automatically configured when [Exclaimer Mail Archiver](#) is installed but further [stores](#) can be [added](#) [\[pg.125\]](#) if required.

Traditional email storage is based upon a hierarchical structure utilizing tags and categories; [Exclaimer Mail Archiver](#) incorporates Web technology which archives messages in a flat structure, designed for maximum speed and reliability. Within each archive [store](#), [security permissions](#) [\[pg.121\]](#) are configured to determine which users can access messages in that [store](#) when using [search facilities](#) [\[pg.177\]](#) and, if granted, what level of access those users have.

Archiving Policies

[Archiving policies](#) [pg.61] are used to define a set of rules which determine if and then where email messages (both sent and received) are archived. Every policy has criteria that control which messages are archived using a sophisticated rules engine and is associated with an [archive store](#), so you can specify where email messages will be archived.

A comprehensive range of [conditions](#) [pg.68] and [exceptions](#) [pg.76] can be specified to control the circumstances under which policies are applied. If a message matches the criteria in a policy then it is archived to the specified [store](#). If it is not matched, it is moved to a [no policies applied sub folder](#) [pg.227].

Search

Once messages are archived, ensuring that users have quick and easy access to them is critical. With [Exclaimer's](#) powerful and innovative search engine (with separate [search indexes](#) [pg.157] for each [store](#) for added flexibility), you can be confident that an archived message is never more than a few seconds away. Administrators can use the [console search](#) [pg.177] to search archive stores from within the [Exclaimer console](#); other users can access [web search](#) [pg.205] options to search the archive stores from desktop computers and web-enabled mobile devices.

Searches are defined using straightforward, intuitive options to [build complex queries](#) [pg.182] based upon a wide range of [conditions](#) [pg.68] and [date range](#) [pg.186] criteria. Having performed a search, any messages that match the specified criteria are displayed in the [search results pane](#). Users will only see results for messages which they have [access permissions](#) [pg.187] to view.

Managing Archived Messages

Having located required email messages in the [archive store](#), users with appropriate [access permissions](#) [pg.121] can choose to view email [content](#) [pg.195], [properties](#) [pg.196] and any [attachments](#) [pg.200]. If required, messages can be [restored](#) [pg.201] to a mailbox or [forwarded](#) [pg.203] to a given email address.

Closing Exclaimer Mail Archiver

The [Exclaimer Mail Archiver](#) application does not need to be running for [policies \[pg.61\]](#) to be processed. To close [Exclaimer Mail Archiver](#), select [exit](#) from the [file](#) menu at the top of the [Exclaimer console \[pg.30\]](#).

Chapter 2

Installation & Deployment

Installation Overview

[Exclaimer Mail Archiver](#) is very straightforward, using an installation wizard to copy required files and complete setup processes behind the scenes.

Having [installed \[pg.19\]](#) [Exclaimer Mail Archiver](#) for the first time, the [first use wizard \[pg.23\]](#) is launched automatically. The [first use wizard](#) takes you through the basic setup required to get started with [Exclaimer Mail Archiver](#).

In this chapter you will find information regarding all aspects of installation, including:

- [System requirements](#); hardware and software requirements - see page 14 for details.
- [Downloading Exclaimer Mail Archiver](#); find out where you can download required installation files - see page 17 for details.
- [System changes](#); find out what changes are made to your system when [Exclaimer Mail Archiver](#) is installed - see page 18 for details.
- The [installation](#) and [first use](#) wizards; step through the installation and first-use setup processes - see pages 19 and 23 (respectively) for details.
- [Uninstalling Exclaimer Mail Archiver](#); find out about how to uninstall [Exclaimer Mail Archiver](#) - see page 27 for details.
- Having run the [installation \[pg.19\]](#) and [first use \[pg.23\]](#) wizards, required setup for [journal mailboxes \[pg.220\]](#) is typically completed automatically. However, there are occasions (for example, with more complex systems) where an administrator may need to check or complete this setup manually.

NOTE

Having run the **installation** and **first use** wizards, required setup for **journal mailboxes** is typically completed automatically. However, there are occasions (for example, with more complex systems) where an administrator may need to check or complete this setup manually. This process is described on page 235.

System Requirements

System requirements for hardware and software are summarized in the following sections.

Mail Archiver Console and Web Server

Hardware

Item	Minimum Requirements	Recommended Requirements
CPU	x64 architecture-based computer	n/a
Memory	2 GB	4 GB
Disk Space*	350 MB	500 MB
Screen Resolution	1024 x 768 pixels	1152 x 864 or higher

*Does not include disk space used by archive storage.

Software

Item	Minimum Requirements	
Operating Systems	Windows Server 2008 x64 Windows Server 2008 SP1 x64 Windows Server 2008 SP2 x64 Windows Server 2008 R2 x64 Windows Small Business Server 2008 Windows Small Business Server 2011 Windows Vista x64	Windows Vista SP1 x64 Windows Vista SP2 x64 Windows 7 x64 Windows 7 SP1 x64 Windows 8 x64 Windows Server 2012 Windows Server 2012 R2
Exchange Server	Microsoft Exchange Server 2007 SP1 Rollup 5 or higher Microsoft Exchange Server 2007 SP2 Microsoft Exchange Server 2007 SP3 Microsoft Exchange Server 2010	Microsoft Exchange Server 2010 SP1 Microsoft Exchange Server 2010 SP2 Microsoft Exchange Server 2013
Microsoft .NET Framework	Microsoft .NET Framework 3.5	

Batch Importer (Exchange Mailboxes)

The [Batch Importer](#) requires a [MAPI provider](#) in order to import Exchange Mailboxes. Please install the [MAPI provider](#) for your version of Exchange from the table below.

NOTE

If you have multiple versions of Microsoft Exchange in your organization use the lowest version currently deployed. Once you have installed an appropriate MAPI client you will need to restart the computer before you can use Batch Importer

MAPI Provider	Exchange 2007		Exchange 2010		Exchange 2013
	Without 2003 Support	With 2003 Support	Without 2003 Support	With 2003 Support	
Outlook 2003		X		X	
Outlook 2007 x86 & x64 x x	X	X	X	X	
Outlook 2010 x86 & x64	X	X	X	X	
Outlook 2013 x86 & x64	X	X	X	X	
MAPI CDO					X*

* Minimum May 2013 release of MAPI CDO 1.2.1 version 6.5.8320 and above.

The columns [Without 2003 Support](#) and [With 2003 Support](#) are related to the answer given when Microsoft Exchange was first installed (or upgraded from Exchange 2003 or lower) in your organization.

One of the questions asked during Setup is *"Do you have any computers running Outlook 2003 and earlier or Entourage in your organization?"* Your answer to this question changes the MAPI providers that can be supported in your organization. If you are unsure of your answer to this question, either check by using [Microsoft Outlook \[pg.16\]](#) or [check by using the Exchange Management Shell on your Microsoft Exchange server \[pg.16\]](#).

Checking by using Microsoft Outlook

1. On any provider computer in your organization open [Microsoft Outlook](#).
2. Click the [Folder](#) icon in the bottom left of the window. (You may have to select [More...](#) or [...](#) depending on the version of [Microsoft Outlook](#) you are using).
3. The list of folders updates. If the list includes [Public Folders](#) then you have 2003 support.

Checking by using the Exchange Management Shell on your Microsoft Exchange server

1. Click [Start](#) > [All Programs](#) > [Microsoft Exchange Server](#) > [Exchange Management Shell](#).

(For [Windows Server 2012](#) and [2012 R2](#), point your mouse to the upper-right corner of the screen, moving the mouse pointer down, and then clicking [Search](#) from the charm menu. Then, type *"Exchange Management Shell"* into the search and press return. Click [Exchange Management Shell](#) from the search results.)

2. The [Exchange Management Shell](#) loads. From here, type the command below and press ENTER:

```
@ (Get-PublicFolderDatabase) .count
```

3. If a number greater than zero is returned, you have 2003 support.
4. Close the [Exchange Management Shell](#).

Downloading Mail Archiver

The [Exclaimer Mail Archiver](#) installation file is named [setup.exe](#) and can be downloaded from the Exclaimer products page (<http://www.exclaimer.com/products/Overview.aspx>).

Once downloaded, [Setup.exe](#) should be run on the required Microsoft Exchange Server, a Windows server or desktop computer that meets the [system requirements](#) [pg.14].

System Changes

The installation process makes the following changes to your system.

File Location(s)

As part of the installation process, you are asked to specify a destination folder, into which program files will be installed. The default folder is [C:\Program Files\Exclaimer Ltd\Mail Archiver](#).

In addition to program files, a number of configuration files are copied to your system. The location of these files is shown below:

Operating System	Location
Windows 7 x64	\ProgramData\Exclaimer Ltd\Mail Archiver
Windows Server 2008 x64	
Windows Server 2008 R2	
Windows Small Business Server 2008	
Windows Small Business Server 2011	

The Installation Process

The installation process for [Exclaimer Mail Archiver](#) is completed using a familiar 'wizard' approach to guide you through each process, step-by-step.

This process includes the [Exclaimer license agreement](#) and copies files to your preferred destination folder. Once complete, you can use the application for five days, after which you must [register for a 30 day trial](#) [pg.38] to continue using [Mail Archiver](#). To complete the [installation wizard](#), follow the steps below:

5. Double click the [setup](#) file to start the installation and display a welcome message:

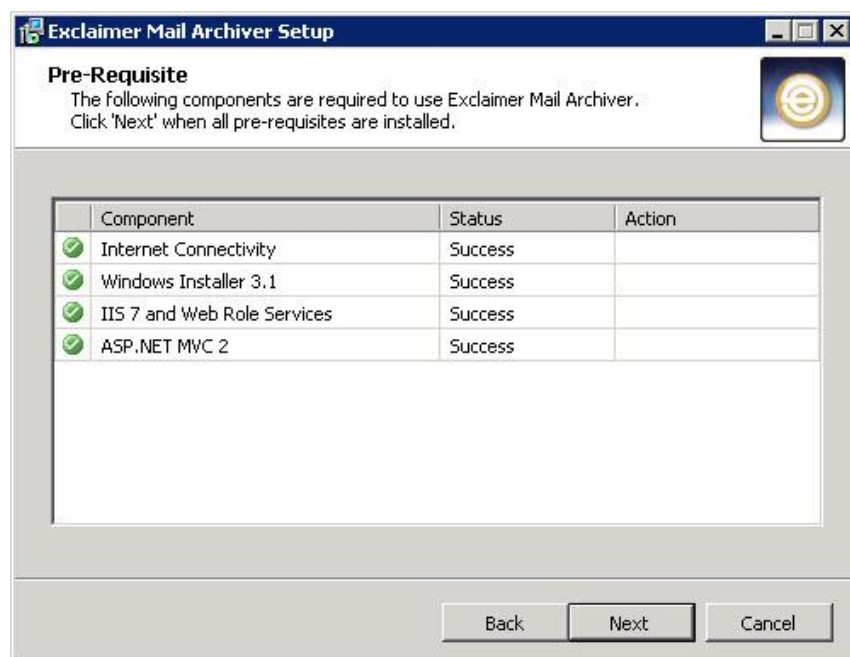


The [batch importer](#) is installed alongside the console to allow you to import email messages from legacy stores (for further information please refer to the separate *Batch Importer User Guide*).

- Click the [next](#) button to view the [end-user license agreement](#):

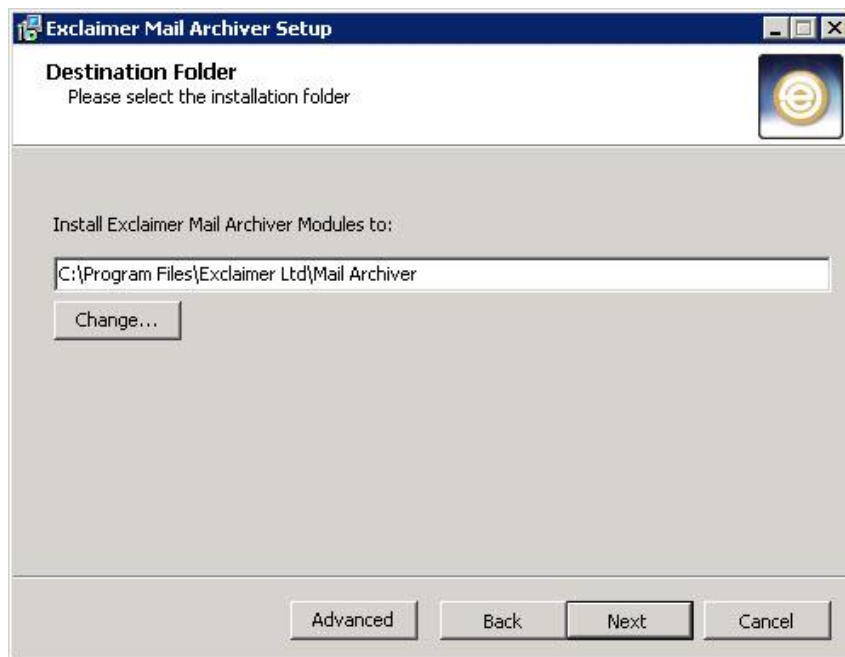


- Having read the [license agreement](#), check the [I accept the terms in the license agreement](#) box and click [next](#) to check for required system components:



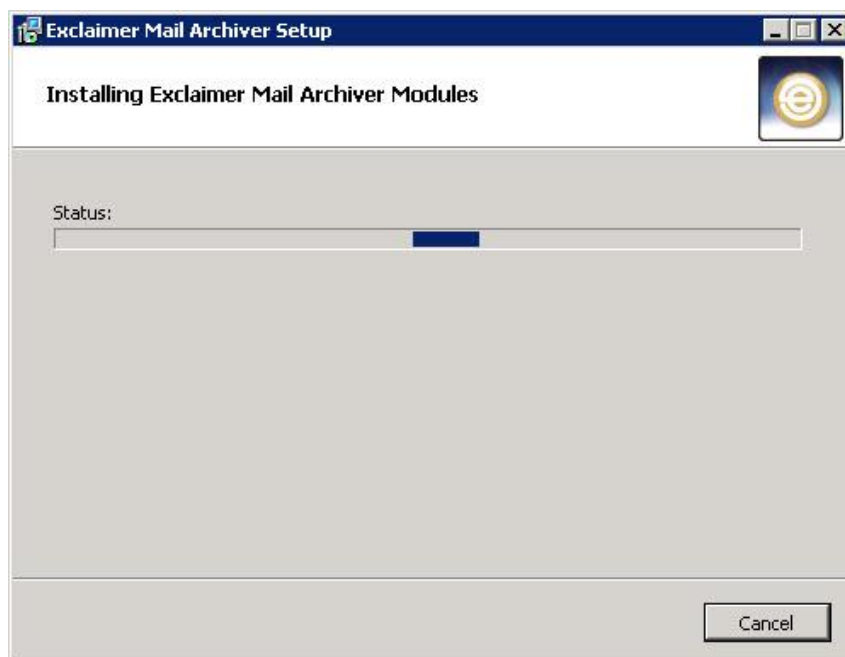
If any required components are not found, you can choose to install them here.

8. Click [next](#) to specify a [destination folder](#) for installed files:



From here you can accept the default folder, or click the [change](#) button to specify a new location.

9. Click [next](#) to perform the installation:



10. Progress is displayed on screen and final confirmation is shown upon completion:

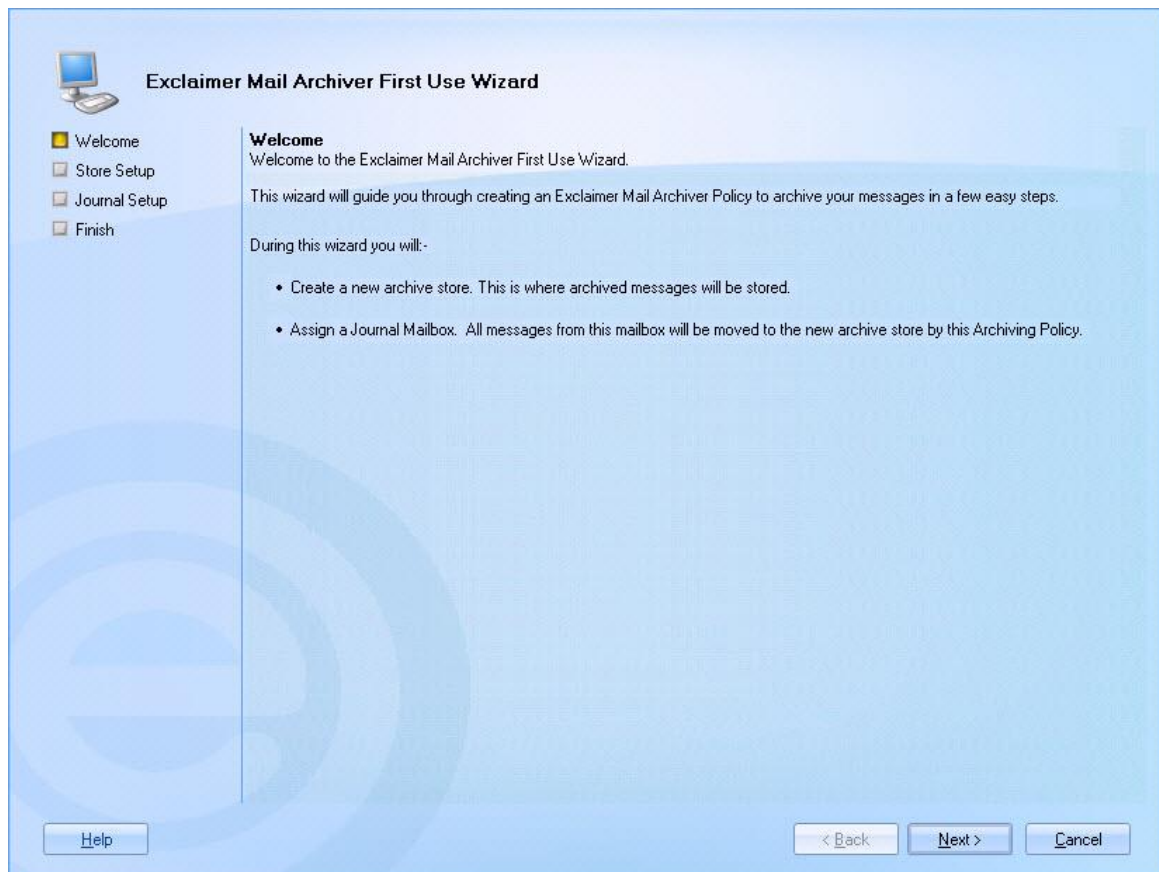


11. Click [finish](#) to close the wizard. If you are installing [Mail Archiver](#) for the first time, the [first use wizard \[pg.23\]](#) is launched. You must complete this wizard to define basic settings and start archiving email messages.

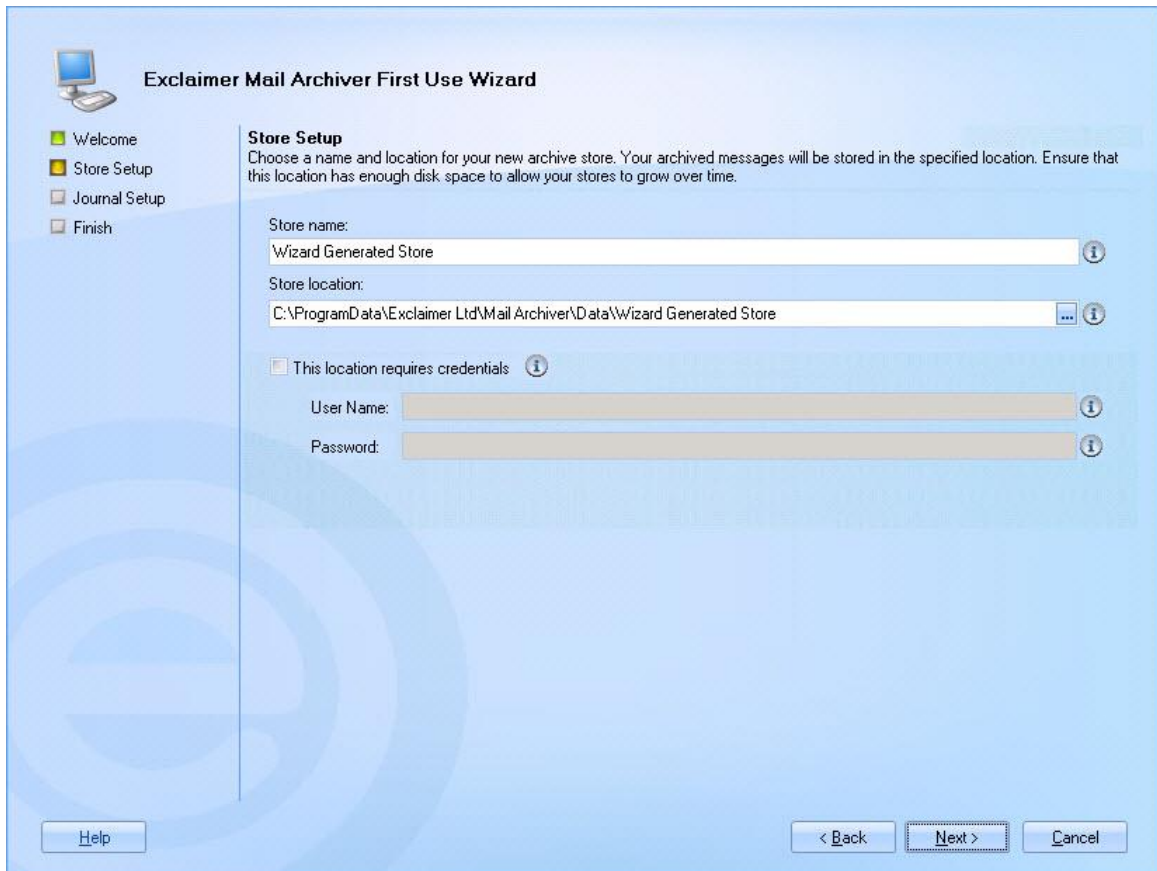
The First Use Wizard

Having completed the [installation wizard](#) [pg.19] for the first time, the [first use wizard](#) is launched automatically. This wizard takes you through the basic setup required to get started with [Exclaimer Mail Archiver](#). To complete this wizard, follow the steps below:

1. The first stage of the [first use wizard](#) displays summary information about the process:



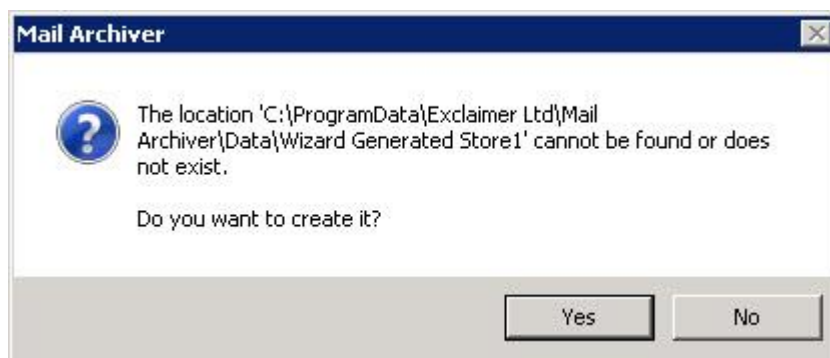
2. Click [next](#) to move to the next stage and define a [store](#) to be used for archiving messages (you can [update this store](#) [pg.114] or [add new stores](#) [pg.126] at any time in future):



The screenshot shows the 'Exclaimer Mail Archiver First Use Wizard' window. On the left is a navigation pane with four steps: 'Welcome' (selected), 'Store Setup', 'Journal Setup', and 'Finish'. The main area is titled 'Store Setup' and contains the following text: 'Choose a name and location for your new archive store. Your archived messages will be stored in the specified location. Ensure that this location has enough disk space to allow your stores to grow over time.' Below this text are three input fields: 'Store name:' with the value 'Wizard Generated Store', 'Store location:' with the value 'C:\ProgramData\Exclaimer Ltd\Mail Archiver\Data\Wizard Generated Store', and a checkbox labeled 'This location requires credentials' which is currently unchecked. Below the checkbox are two more input fields: 'User Name:' and 'Password:'. At the bottom of the window are three buttons: '< Back', 'Next >', and 'Cancel'. A 'Help' button is located in the bottom left corner.

Here, enter the required [store name](#) and select a [store location](#). If the [location](#) requires a username/password for access, select the [this location requires credentials](#) check box and enter required details. For further information about these options please refer to the [adding a new store](#) [pg.126].

3. Click [next](#). If the store does not already exist, you are prompted to create it::



4. Click [yes](#) to create the [store](#) and access [journal setup](#) options:

The screenshot shows the 'Exclaimer Mail Archiver First Use Wizard' window. On the left is a navigation pane with four steps: 'Welcome' (selected), 'Store Setup', 'Journal Setup', and 'Finish'. The main area is titled 'Journal Setup' and contains the following text: 'Exclaimer Mail Archiver will read messages from the specified Exchange Journal mailbox and transfer them to the archive store in accordance with the conditions of the policy.' Below this text are two radio button options. The first option, 'Use an existing Exchange Journal account', is selected. It includes a table with two columns: 'Account' and 'Email Address'. The table has one row with the values 'Journal' and 'Journal@network26.local'. Below the table is a 'Password:' label followed by a masked password field. The second option, 'Create a new Exchange Journal account and add an Exchange Journal Rule to journal all messages to this account', is unselected. It includes 'Account:' and 'Password:' labels followed by empty text input fields. At the bottom of the window are four buttons: 'Help', '< Back', 'Next >', and 'Cancel'.

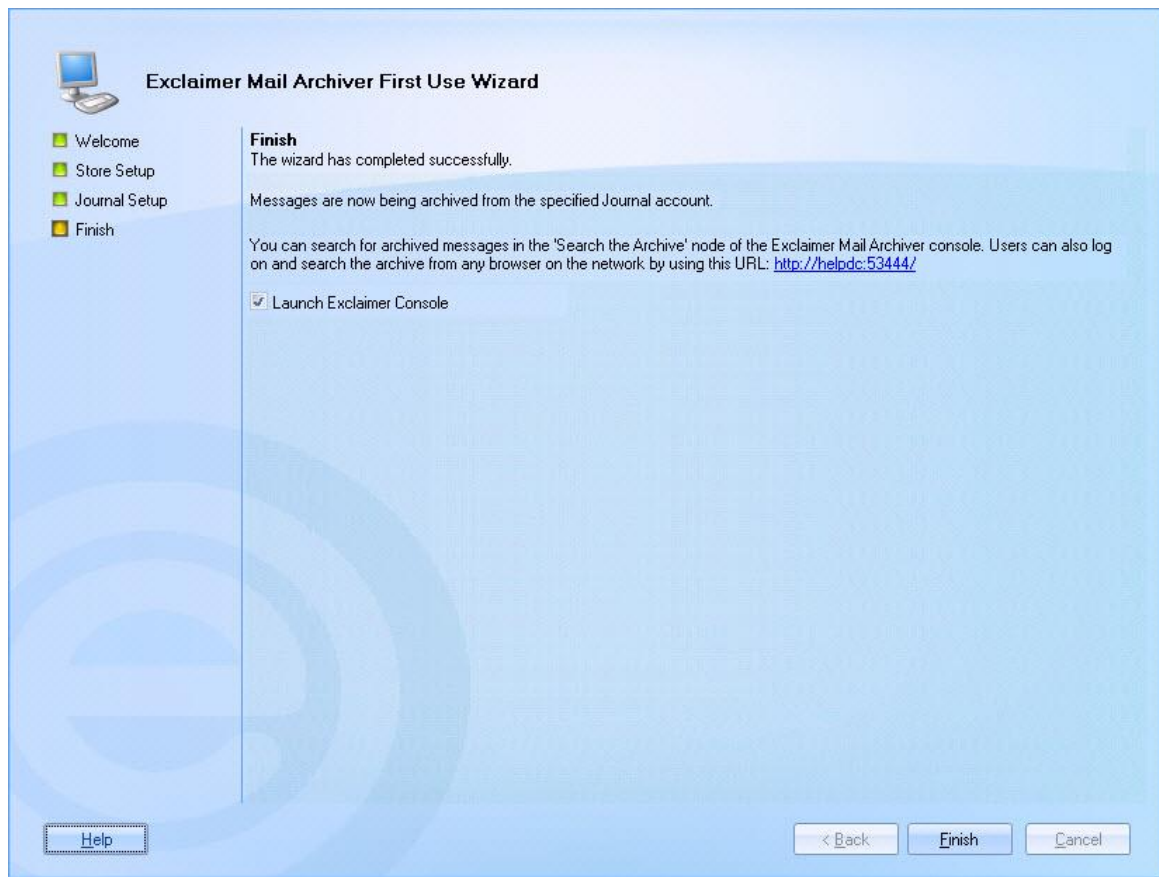
Account	Email Address
Journal	Journal@network26.local

Exclaimer Mail Archiver draws upon [journaling](#) functionality within [Microsoft Exchange](#). Here, you need to specify which [Exchange journaling mailbox](#) to poll, either by selecting an existing [Journal account](#) or creating a new one. For further information about adding and updating [journal mailboxes](#), please refer to the [journal mailbox importers](#) section [pg.220].

Exclaimer Mail Archiver will attempt to connect to [Microsoft Exchange](#) using [Exchange Web Services](#). In a correctly configured environment it will find the [Exchange Web Services URL](#) automatically using [Autodiscover](#). If this fails, you will need to manually enter the [Exchange Web Services URL](#) - this tells the system where to find the required [journal mailbox](#).

Use the [test connectivity](#) button to test these settings. For further information please refer to the [journal mailbox importers](#) section [pg.225].

5. Click [next](#) to complete the wizard:



6. Click [finish](#) to exit and launch the [Exclaimer console](#) [pg.30]. With default settings defined in this wizard, all messages in the specified [Exchange journaling mailbox](#) will be archived to the [store](#) defined in [step 2](#) [pg. 24].
7. If required, you can now define [policies](#) [pg.61] to specify [conditions](#) [pg.68] under which emails will be archived and/or add further [stores](#) [pg.126] / [journal mailbox importers](#) [pg.225].

Uninstalling Mail Archiver

When [Exclaimer Mail Archiver](#) is uninstalled, your [Exclaimer Mail Archiver](#) configuration files and [archive stores](#) are not removed as part of the automated uninstall process.

The location of these files on your system is shown below:

Operating System	Location
Windows Vista x64	\ProgramData\Exclaimer Ltd\Mail Archiver
Windows 7 x64	
Windows Server 2008 x64	
Windows Server 2008 R2	
Windows Small Business Server 2008	
Windows Small Business Server 2011	

Preparation

As a precaution you may wish to export your configuration before running the uninstall process.

The export includes all settings for [Exclaimer Mail Archiver](#). These are written to an [econfig](#) file, a proprietary file type for Exclaimer products. To export current settings, follow the steps below:

1. Open the [Exclaimer Console](#).
2. Ensure that [Exclaimer](#) is selected in the console tree (i.e. the topmost branch).
3. Select [export current configuration settings](#) from the [actions pane](#), or from the [action menu](#). The [export configuration](#) window is displayed.
4. Navigate to the required drive and folder, to which the export file should be saved.
5. Specify the required file name for the export file.
6. Click [save](#) to complete the export.

Running the Uninstall Process

There are two ways to start the uninstall process for [Exclaimer Mail Archiver](#):

- Activate the original [setup.exe](#) and choose the [uninstall](#) option; then follow on-screen instructions.
- Use [programs and features](#) in Windows Server 2008, Windows Vista or Windows 7; then follow on-screen instructions.

NOTE

All installed components of Mail Archiver need to be uninstalled - i.e.:

- Exclaimer Mail Archiver
- Exclaimer Mail Archiver Batch Importer
- Exclaimer Mail Archiver Web Search

Chapter 3

The Exclaimer Console

Introduction

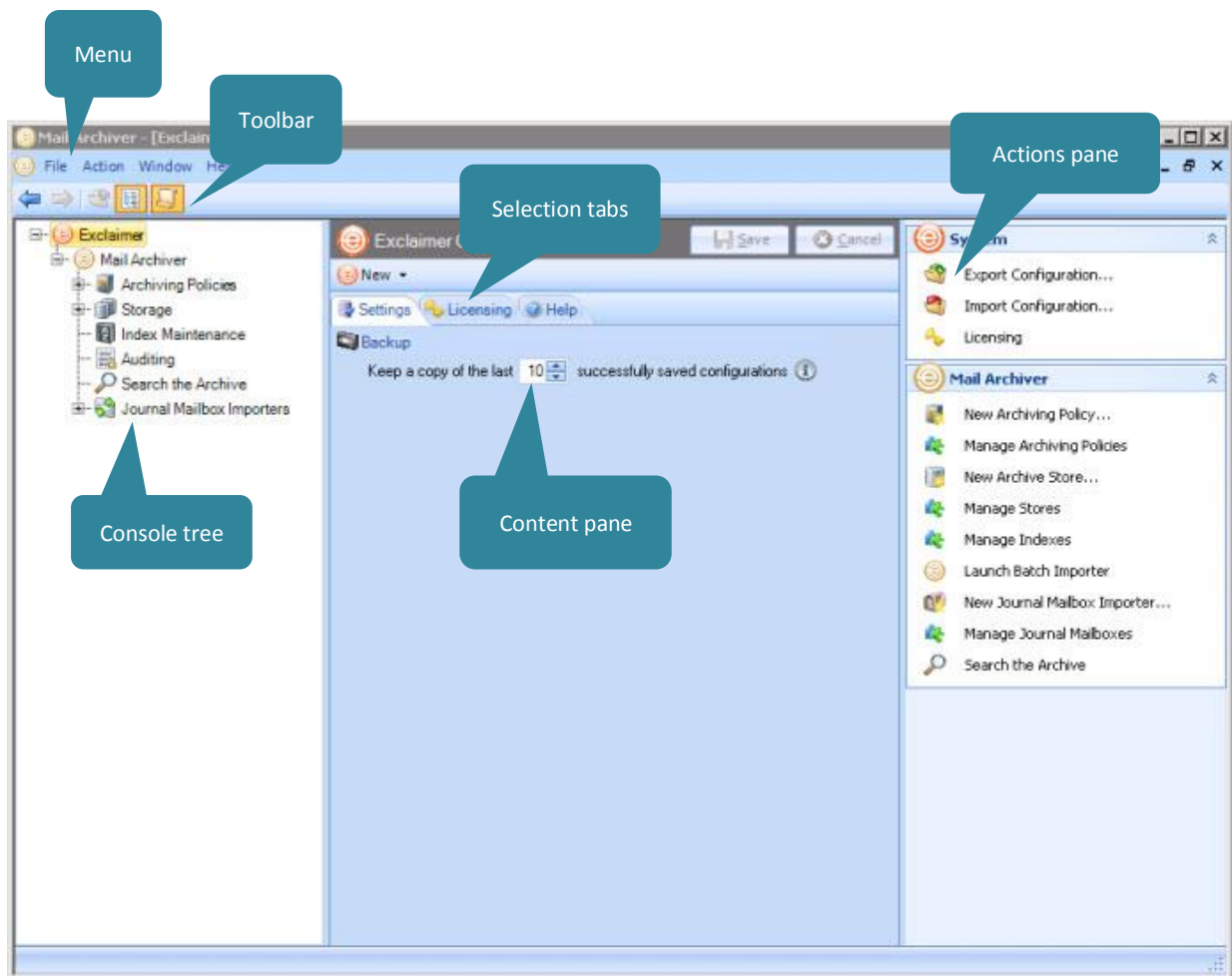
The [Exclaimer console](#) can be thought of as the 'control centre' for [Exclaimer Mail Archiver](#). From here, you can define general settings which are applicable to the system as a whole, and access each section of the application. This section explains how the Exclaimer console is used, including:

- [Understanding the Exclaimer Console window](#) [pg.31]
- [Exclaimer console settings](#) [pg.37]
- [Exclaimer console licensing](#) [pg.38]
- [Saving Changes in the Exclaimer Console](#) [pg.40]
- [Exporting configuration settings](#) [pg.41]
- [Importing configuration settings](#) [pg.41]

If you already know about the console and wish to get started with [Exclaimer Mail Archiver](#), see the [Mail Archiver](#) [pg.43] section of this guide.

Understanding the Exclaimer Console Window

The Exclaimer console window is split into three panes, as shown and [summarized](#) [pg.32] below:



Exclaimer Console Summary

Available options in the [Exclaimer console](#) are summarized in the following sections:

- [Console menu](#) [pg.33]
- [Console toolbar](#) [pg.34]
- [Console tree](#) [pg.35]
- [Content pane](#) [pg.35]
- [Selection tabs](#) [pg.35]
- [Actions pane](#) [pg.36]






Console Menu

The console menu provides access to key areas and tasks within the [Exclaimer console](#). Available options are summarized below:

Menu	Summary
File	Save
	Use this option to save any changes made in the current content pane [pg.35].
	Exit
	Use this option to close the console. If any unsaved changes are detected, you are prompted to save before exiting.
Action	New
	Use this option to create a new archiving policy [pg.86].
	Export configuration...
	Use this option to export current configuration settings [pg.41] for the console.
	Import configuration...
	Use this option to import current configuration settings [pg.41] for the console.
Window	New Window
	Use this option to open another instance of the console - for example, if you need to refer to settings made in one tab whilst updating another. All open windows are listed at the bottom of the window menu, so you can easily switch between sessions. The new window option is also available from the action menu.
	Cascade
	If you have used the new window option to open multiple instances of the console, use this option to display all windows in a 'cascade'.
	Tile Horizontally
	If you have used the new window option to open multiple instances of the console, use this option to display all windows horizontally, across the screen.
Help	Contents
	Use this option to open the help system.
	About
	Use this option to display version information for the console.

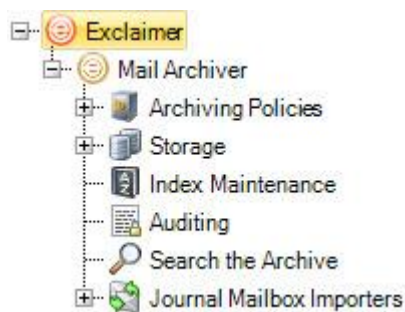
Console Toolbar

The console toolbar provides quick access to key tasks. These tasks are also available from the [console menu \[pg.33\]](#), but have been placed on the toolbar for faster access. Options on this toolbar vary, depending on which branch of the [console tree \[pg.35\]](#) is currently selected. Those listed below are available when the top level ([Exclaimer](#)) branch is selected:

Option	Function	Summary
	Back	Whilst navigating through the console tree , use this option to go back one level.
	Forward	If you are navigating the console tree and used the back button, use this option to go forward again (i.e. to return to the point reached before you went back).
	Up	Whilst navigating through the console tree , use this option to move up to the parent of the current branch.
	Show /Hide Console Tree	Use this toggle option to show the console tree if it is currently hidden, or hide the console tree if it is currently shown.
	Show /Hide Actions Pane	Use this toggle option to show the actions pane if it is currently hidden, or hide the actions pane if it is currently shown.

Console Tree

To navigate the [Exclaimer console](#) (and all applications within it), a familiar tree structure is used. The [Exclaimer console](#) is always at the topmost level, from which any number of parent / child branches (also known as [nodes](#)) is displayed. Having selected a branch from the tree, the content pane displays information and options that are relevant for that branch. Options on the [toolbar](#) [pg.34] can be used to quickly navigate between branches within the console tree.



NOTE

The console tree can be hidden or shown using the hide / show console tree button on the toolbar. For quick navigation, use back, forward and up buttons from the toolbar.

Content Pane

Having selected a branch in the [console tree](#), any information and settings associated with that branch are displayed in the [content pane](#). These settings are accessed using a series of [selection tabs](#) [pg.35] at the top of the pane.

Selection Tabs

Information and settings are organized into a series of tabs, accessed from the top of the content pane. Available tabs vary, depending on which branch of the [console tree](#) is currently selected. Those shown here are available when the top level ([Exclaimer](#)) branch is selected ([settings](#) [pg.37] and [licensing](#) [pg.38]).

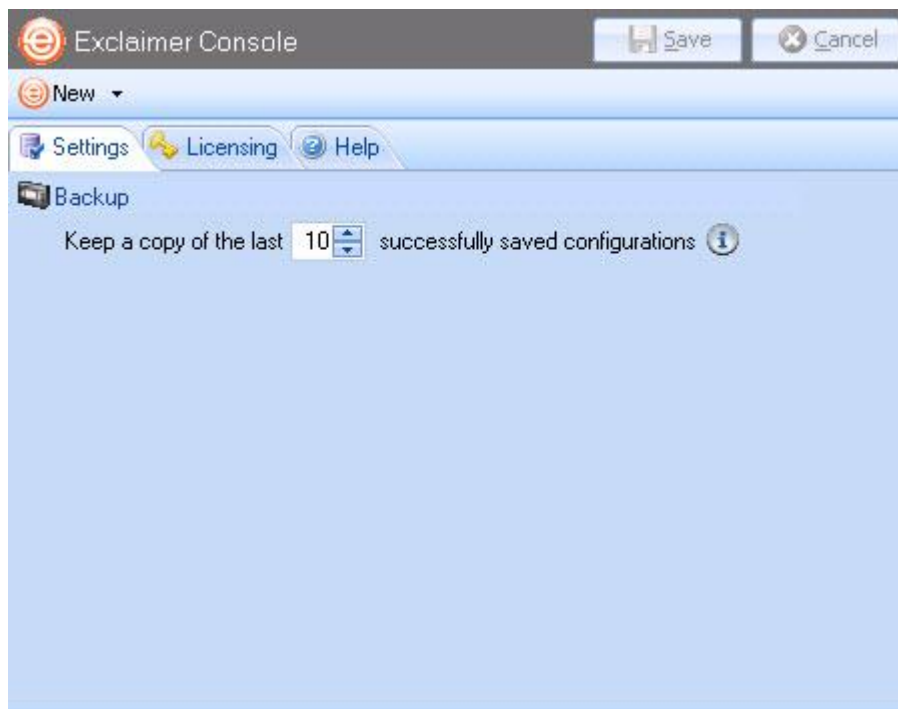
Actions Pane

The [actions](#) pane is available throughout the system and displays quick access to common tasks, as summarized below:

Action	Select this option to...
System	
Export Configuration...	Export all settings - see the export configuration... page [pg.41].
Import Configuration...	Import a previously exported configuration file - see the import configuration... page [pg.41].
Licensing	Access the licensing tab to view licensing information [pg.38].
Mail Archiver	
New Archiving Policy	Use this option to create a new archiving policy [pg.86].
Manage Archiving Policies	View and manage existing archiving policies [pg.61].
New Archive Store	Run the new archive store wizard [pg.125] to create a new archive store [pg.110] (into which specified messages will be archived, as determined by archiving policies [pg.61]).
Manage Stores	View and manage existing archive stores [pg.110].
Manage Indexes	View and manage search indexes [pg.157].
Launch Batch Importer	Use the batch importer wizard [pg.135] to import messages from a given source location into an Exclaimer Mail Archiver store [pg.110].
New Journal Mailbox Importer	Run the new journal mailbox importer wizard [pg.230] to create a new journal mailbox importer [pg.220] which will continually move messages from an existing Exchange journal mailbox into the specified archive store(s) [pg.110], as determined by archiving policies [pg.61].
Manage Journal Mailbox Importers	View and manage existing journal mailbox importers [pg.220].
Search the Archive	Access search [pg.177] options within the Exclaimer Console. Note that users without access to the Exclaimer console can use the web search [pg.205] facility to search for archived messages.

Exclaimer Console Settings

The [settings](#) tab contains options for the [Exclaimer console](#):



Each time that configuration changes are saved, a backup of the previous configuration is created and details of this are stored in the [Windows event log](#). The [keep a copy of the last...](#) option is used to specify the maximum number of backups that will be retained, or set this value to zero if you do not wish such backups to take place.

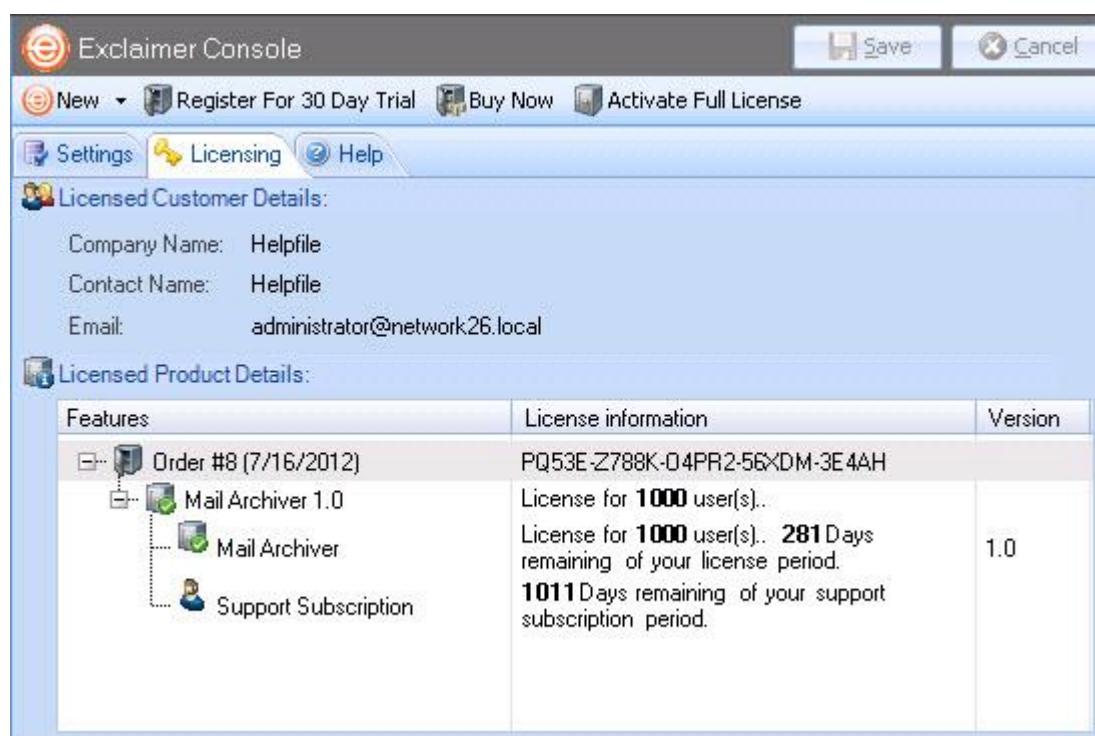
Specific [settings for Mail Archiver](#) [pg.45] are available when the [Mail Archiver](#) branch is selected in the console tree.

NOTE

Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the **save** button to save changes across all tabs. Alternatively, use the **cancel** button to abandon all changes.

Exclaimer Console Licensing

The [licensing](#) tab contains information regarding licenses for [Exclaimer Mail Archiver](#):



Licensing information is summarized in the following sections:

- [The licensing process](#) [pg.38]
- [Licensing information](#) [pg.39]
- [The licensing toolbar](#) [pg.39]

The Licensing Process

Our aim is to get you working with Exclaimer software as quickly as possible. As such, we have implemented a flexible licensing policy with minimal restrictions during the trial period.

If you have installed Exclaimer software for the first time, you can use it for five days without any form of registration. After five days, you are prompted to register for a 30 day trial. Having completed a trial period, you can:

- Purchase and then activate the license.
- Contact the [Exclaimer sales team](#) to extend your trial.

Licensing Information

The [licensing](#) tab shows any contact details associated with this Exclaimer license, together with installed products, features and version information. You can also see the type of license that is currently in place and the license status (for example, the number of days remaining for a trial).

The Licensing Toolbar

When the [licensing](#) tab is displayed, the [licensing](#) toolbar contains the following options:

Toolbar Option	Summary
Register for 30 day trial	This option can be used if your initial five days usage is complete and you wish to have a longer evaluation period.
Extend trial	This option is only displayed if you have registered for a 30 day trial.
Buy now	Access the Exclaimer website products page to purchase a license.
Activate full license	Having purchased a license, you will receive an email which includes a product activation key.

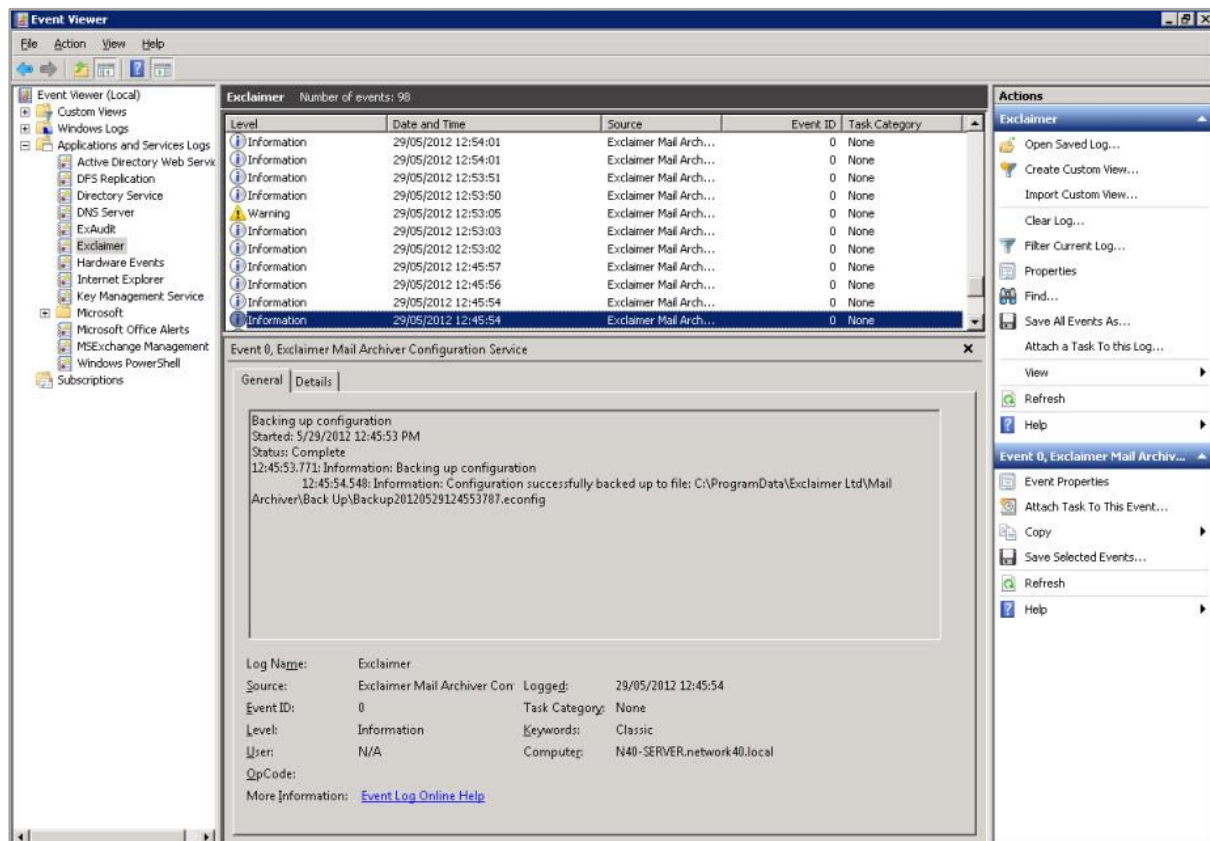
NOTE

Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the **save** button to [save changes \[pg.40\]](#) across all tabs. Alternatively, use the **cancel** button to abandon all changes.

Saving Changes in the Exclaimer Console

Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the [save](#) button to save changes across all tabs.

Before changes are saved, existing configuration settings are automatically backed up. Backups are written to the [Windows event log](#) - for example:



To access the [Windows Event Log](#):

1. On the appropriate computer, click [start](#).
2. Select [administrative tools](#).
3. Select [event viewer](#).

If you are unsure about any changes that have been made, use the [cancel](#) button to abandon all changes.

Exporting Configuration Settings

The [export configuration...](#) option is used to export all settings for the [Exclaimer console](#), and all Exclaimer applications within it. As such, the export will include all [archiving policies](#) for [Exclaimer Mail Archiver](#) [pg.61].

The export process writes all settings to an [econfig](#) file; this is a proprietary file type for Exclaimer products and is required if you wish to import settings from a file. To export current settings, follow the steps below:

1. Ensure that [Exclaimer](#) is selected in the console tree (i.e. the topmost branch).
2. Select [export configuration...](#) from the [actions pane](#), or from the [action](#) menu. The [export configuration](#) window is displayed.
3. Navigate to the required drive and folder, into which the export file should be saved.
4. Enter the required [file name](#) for the export file.
5. Click [save](#) to complete the export.

NOTE

The export option is useful for backing up configuration settings to a safe storage area or a network backup area.

Importing Configuration Settings

The [import configuration...](#) option is used to import all settings for the [Exclaimer console](#), and all Exclaimer applications within it. As such, the import will include all [archiving policies](#) for [Exclaimer Mail Archiver](#) [pg.61].

Settings must be imported from an [econfig](#) file; this is a proprietary file type for Exclaimer products, and is created whenever the [export configuration...](#) option is used [pg.41]. To import configuration settings, follow the steps below:

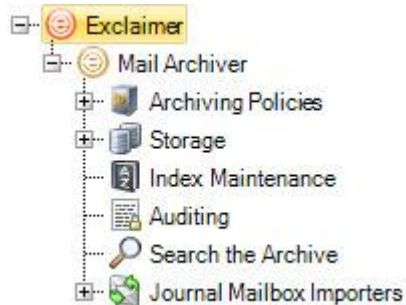
1. Ensure that you have backed up existing settings by [exporting the current configuration](#) [pg.41].
2. Ensure that [Exclaimer](#) is selected in the console tree (i.e. the topmost branch).
3. Select [import configuration...](#) from the [actions pane](#), or from the [action](#) menu. The [import configuration](#) window is displayed.
4. Navigate drives and folders to select the [econfig](#) file to be imported.
5. Click [open](#) to complete the import.

Chapter 4

General Settings & Information

Introduction

The [Mail Archiver](#) branch (within the [Exclaimer console \[pg.30\]](#) tree) is where general setup is completed:

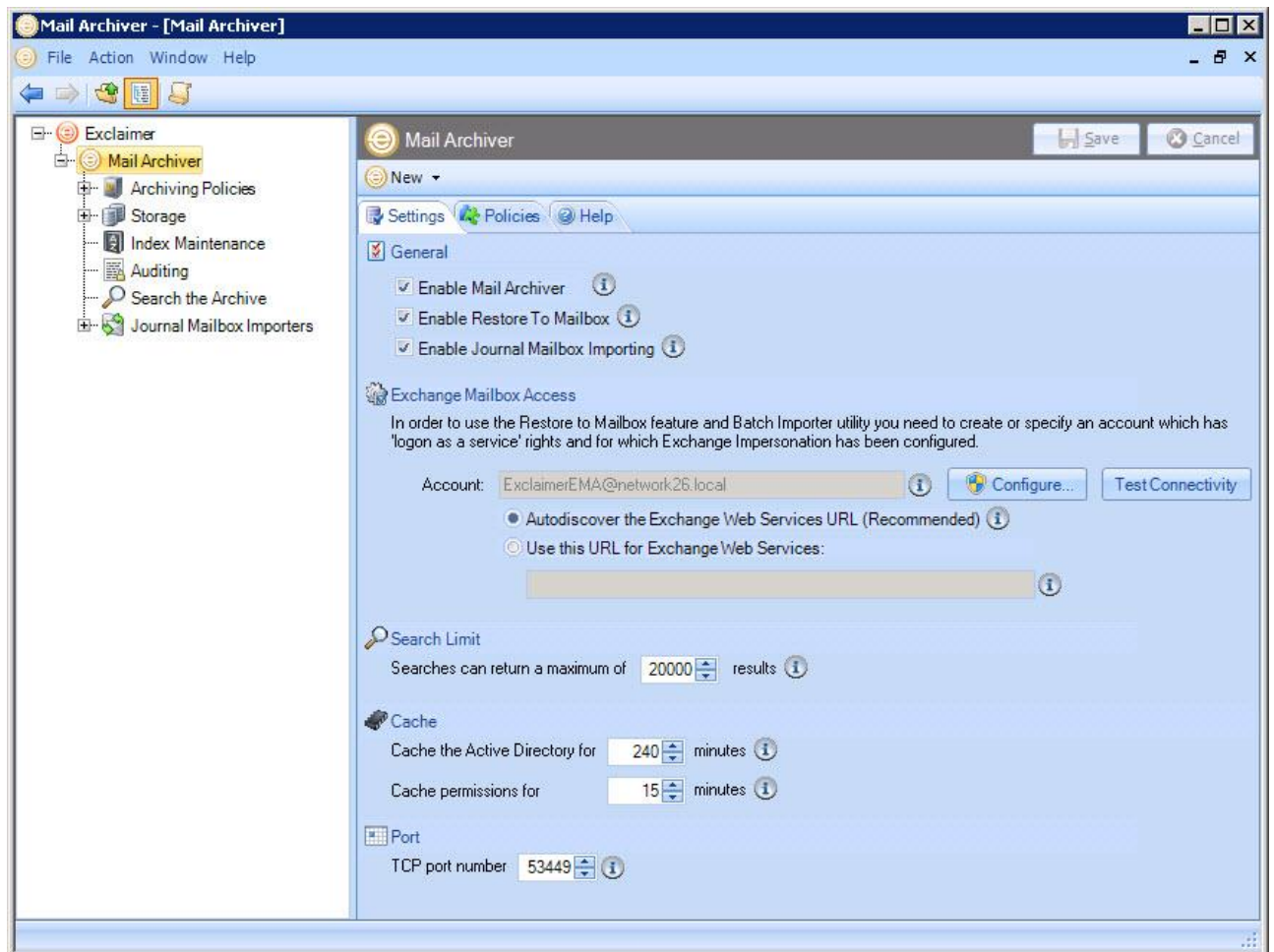


When the parent branch ([Mail Archiver](#)) is selected, [general settings and information \[pg.44\]](#) can be viewed and updated. Below this, a number of child branches are used to manage email archiving:

- Control which messages are archived and which store they should be archived to using [archiving policies \[pg.61\]](#).
- Use one archive store for all messages or define/manage additional stores using [storage options \[pg.110\]](#).
- View and manage search [indexes \[pg.157\]](#).
- Have confidence that configuration changes and user activity within [Mail Archiver](#) is logged by the [auditing](#) facility [\[pg.171\]](#).
- Perform fast, cross-mailbox [searches](#) from within [Mail Archiver](#), desktop computers or mobile devices [\[pg.177\]](#).
- Control which [Exchange journal mailboxes](#) are polled for email messages using [journal mailbox importers \[pg.220\]](#).

General Settings and Information

When the parent branch ([Mail Archiver](#)) is selected (within the [Exclaimer console tree \[pg.30\]](#)), you can define [settings \[pg.45\]](#) to determine how [Exclaimer Mail Archiver](#) should operate and also access any existing [archiving policies \[pg.61\]](#):



NOTE

For further information about the Exclaimer console (including the menu, toolbar and actions pane), see [understanding the Exclaimer console window \[pg.31\]](#).

Mail Archiver Settings

When the [Mail Archiver](#) branch is selected in the [Exclaimer console](#) [pg.30] tree, you can use the [settings](#) tab to define general settings for [Exclaimer Mail Archiver](#):

Mail Archiver [Save] [Cancel]

New ▾

Settings Policies Help

☒ **General**

☒ Enable Mail Archiver ⓘ

☐ Enable Restore To Mailbox ⓘ

☒ Enable Journal Mailbox Importing ⓘ

Exchange Mailbox Access

In order to use the Restore to Mailbox feature and Batch Importer utility you need to create or specify an account which has 'logon as a service' rights and for which Exchange Impersonation has been configured.

Account: [] ⓘ [Configure...] [Test Connectivity]

☒ Autodiscover the Exchange Web Services URL (Recommended) ⓘ

☐ Use this URL for Exchange Web Services: [] ⓘ

Search Limit

Searches can return a maximum of [20000] results ⓘ

Cache

Cache the Active Directory for [240] minutes ⓘ

Cache permissions for [15] minutes ⓘ

Port

TCP port number [53449] ⓘ

Available options are summarized in the following sections:

- [The settings toolbar](#) [pg.46]
- [Available settings](#) [pg.46]
- [Exchange Mailbox Access Wizard](#) [pg.48]

The Settings Toolbar

When the [settings](#) tab is displayed, the [settings](#) toolbar contains the following options:

Toolbar Option	Summary
New > Archiving Policy	Launch the new archiving policy wizard [pg.87] to create a new policy to be applied when archiving messages.

Available Settings

Fields on this tab are summarized below:

Option	Summary
Enable Mail Archiver	Enable or disable Exclaimer Mail Archiver . If this option is not set to enabled, archiving policies [pg.61] will not be applied and your organization's email messages will not be archived. However, Microsoft Exchange will continue to place messages in the journal mailbox .
Enable Restore to Mailbox	Enable or disable the option for users to restore [pg.201] messages to a mailbox. If this option is not selected, the restore [pg.201] option will not be available. This option can only be enabled after configuring an Exchange Mailbox Access account (see below).
Enable Journal Mailbox Importing	Exclaimer Mail Archiver works by drawing email messages from a Journaling Mailbox in Microsoft Exchange . These messages are passed to the Exclaimer Rules Engine , where archiving policies [pg.61] are processed to determine how each message will be archived. If this option is disabled, email messages will not be drawn from Microsoft Exchange and so archiving is not performed. Note that if you wish to change the location of an archive store [pg.116] , Journaling Mailbox importing must be disabled here first.
Exchange Mailbox Access	Exchange mailbox access options are used to specify or create an account with appropriate permissions (Exchange Impersonation) for the following actions: <ul style="list-style-type: none">● Gaining access to Exchange mailboxes to import emails via the batch importer [pg.135].● Restoring messages [pg.201] from the archive to a user's mailbox.● Forwarding messages [pg.203] from the archive to a given email address. <div>.../continued</div>

Option	Summary
Exchange Mailbox Access (continued)	Account
	Exclaimer Mail Archiver needs authority to access Exchange mailboxes for all users - this is known as Exchange Impersonation . The account configured here will be used to run the Exclaimer Mail Archiver service which has impersonation rights for everyone in the organization, so all mailboxes can be accessed. Once configured, this account is used for various tasks within Exclaimer Mail Archiver , including use of the batch importer [pg.135] and restoring / forwarding [pg.201] messages from an archive search [pg.177].
	Use the test connectivity button to check account settings. This option attempts to connect through EWS using the details that you have specified and any error will be reported to you for further investigation.
	Configure
	Select the configure button to launch the Exchange Mailbox Access Account Wizard [pg.48] and specify (or create) the Exchange Mailbox Access account to be used.
	Autodiscover the Exchange Web Services URL
	The Exchange Web Services URL tells the system where to find required Exchange data. On a correctly configured system, this URL is easily found using autodiscover (a Microsoft technology). However, for particularly complex or incorrectly configured systems, autodiscover may not work and so details must be entered manually.
Search Limit	Use this URL for Exchange Web Services
	If the autodiscover option fails to detect the correct URL for Exchange Web Services , select this radio button and enter the required URL in the associated field.
Cache	Cache the Active Directory for...
	Use this setting to minimize the number and frequency of queries to the Active Directory when evaluating policy conditions [pg.68] and exceptions [pg.76] to improve the performance of the product.
	Cache Permissions for...
	Use this setting to minimize the number and frequency of queries to the Active Directory when evaluating store security permissions [pg.121] based upon AD objects (groups, organizational units, etc.) to improve the performance of the product.

NOTE

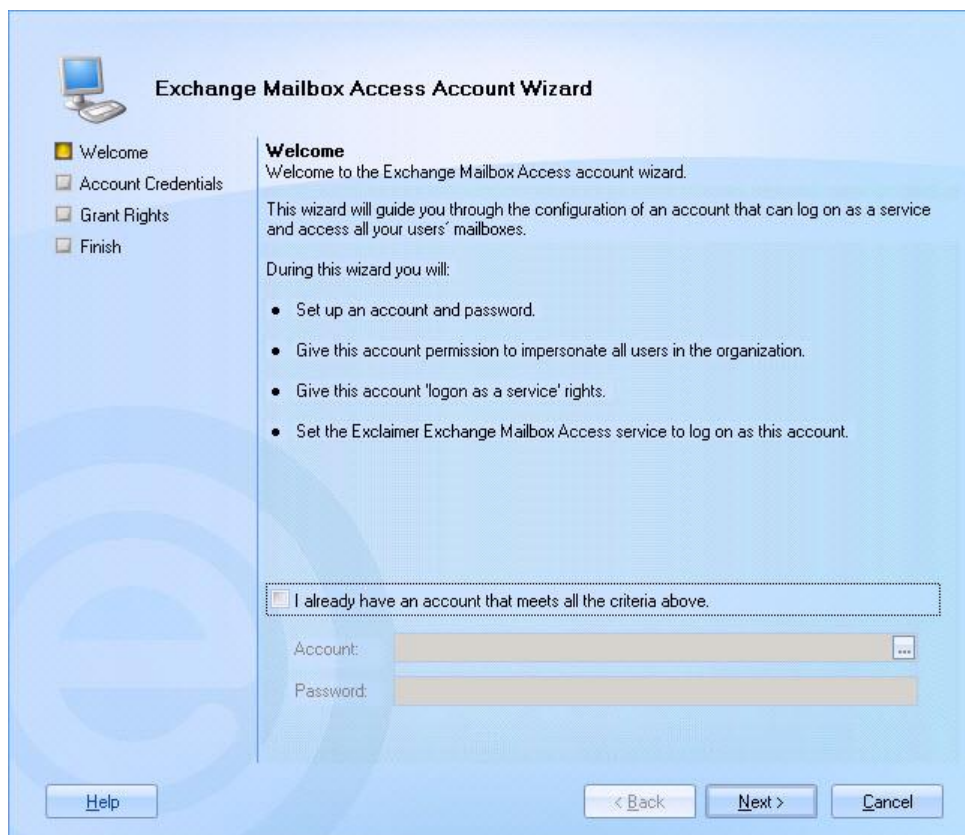
Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the **save** button to [save changes](#) [pg.40] across all tabs. Alternatively, use the **cancel** button to abandon all changes.

Exchange Mailbox Configuration (Standard)

The [configure](#) button for [Exchange Mailbox Access](#) [pg.45] is used to configure a user to have authority to access [Exchange](#) mailboxes for all users. If you are running this wizard from a [Microsoft Exchange](#) computer, follow the steps below.

If you are running this wizard from a [non Microsoft Exchange](#) computer, please refer to the [Exchange Mailbox Configuration \(Non Microsoft Exchange Computer\)](#) [pg.52] section for separate instructions.

1. Having clicked the [configure](#) button, the [Exchange Mailbox Account Access Wizard](#) is launched. From here, you can choose to enter the required [account](#) and [password](#) (if known):



The image shows the 'Exchange Mailbox Access Account Wizard' window. On the left is a navigation pane with four steps: 'Welcome' (selected), 'Account Credentials', 'Grant Rights', and 'Finish'. The main area has a 'Welcome' heading and text explaining the wizard's purpose: to configure an account for service access to all mailboxes. It lists four tasks: setting up an account and password, granting impersonation rights, granting 'logon as a service' rights, and setting the Exclaimer service to use this account. Below this is a checkbox labeled 'I already have an account that meets all the criteria above.' followed by 'Account:' and 'Password:' text boxes. At the bottom are 'Help', '< Back', 'Next >', and 'Cancel' buttons.

Exchange Mailbox Access Account Wizard

Welcome

Welcome to the Exchange Mailbox Access account wizard.

This wizard will guide you through the configuration of an account that can log on as a service and access all your users' mailboxes.

During this wizard you will:

- Set up an account and password.
- Give this account permission to impersonate all users in the organization.
- Give this account 'logon as a service' rights.
- Set the Exclaimer Exchange Mailbox Access service to log on as this account.

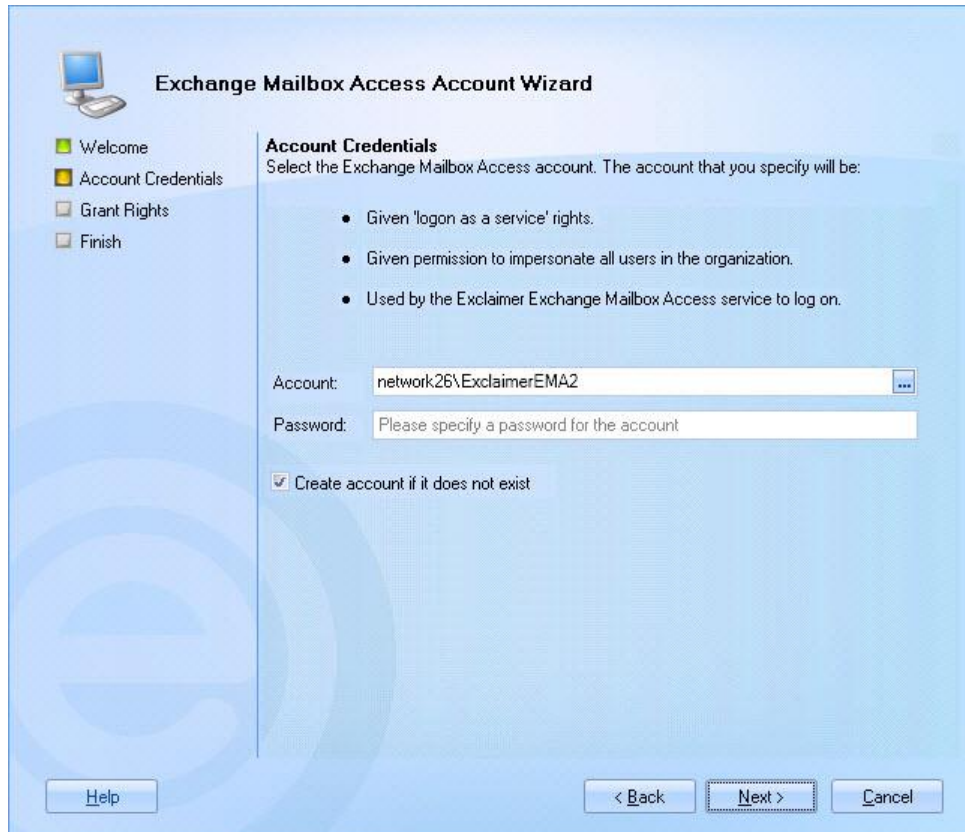
☐ I already have an account that meets all the criteria above.

Account:

Password:

[Help](#) [< Back](#) [Next >](#) [Cancel](#)

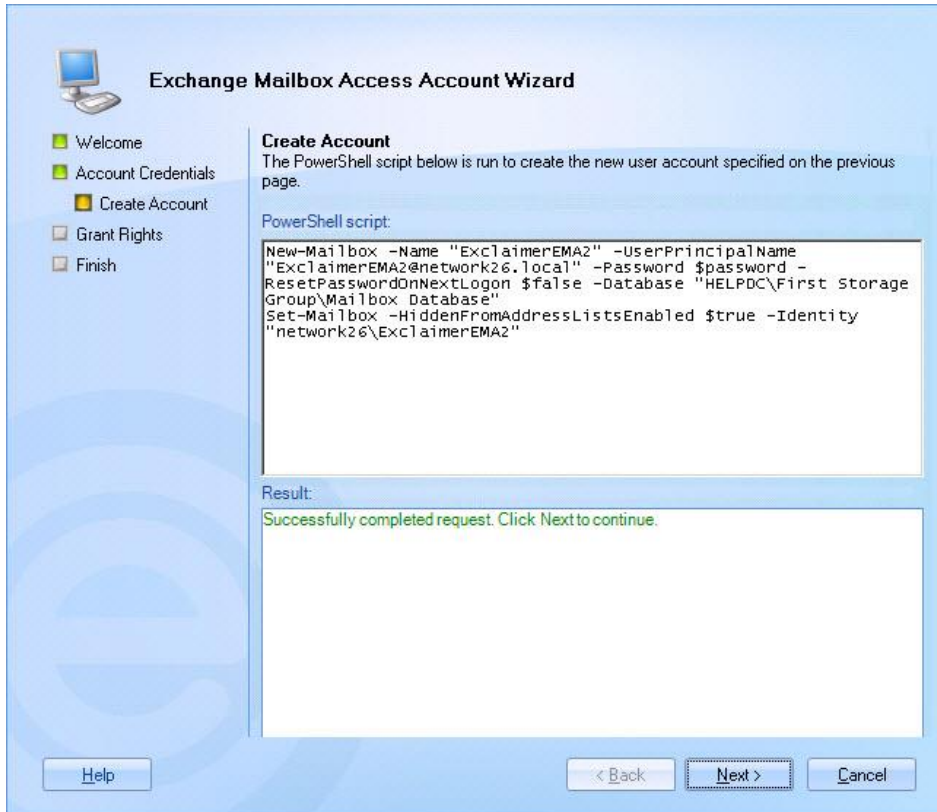
2. If you know of a suitable account, click the [I already have an account that meets all of the criteria above...](#) check box and enter required credentials (or you can click the [browse](#) button [...] associated with the [account](#) field to locate and select an account from the Active Directory).
3. Having done this, click [next](#) to go directly to the end of this wizard and exit. Alternatively, click [next](#) to configure an account with required permissions:



The screenshot shows the 'Exchange Mailbox Access Account Wizard' window. On the left, a navigation pane lists four steps: 'Welcome' (selected with a green square), 'Account Credentials' (selected with a yellow square), 'Grant Rights', and 'Finish'. The main area is titled 'Account Credentials' and contains the instruction 'Select the Exchange Mailbox Access account. The account that you specify will be:'. Below this, there are three bullet points: 'Given 'logon as a service' rights.', 'Given permission to impersonate all users in the organization.', and 'Used by the Exclaimer Exchange Mailbox Access service to log on.'. There are two text input fields: 'Account:' with the value 'network26\ExclaimerEMA2' and a browse button [...], and 'Password:' with the placeholder text 'Please specify a password for the account'. A checkbox labeled 'Create account if it does not exist' is checked. At the bottom, there are three buttons: 'Help', '< Back', and 'Next >', and a 'Cancel' button.

4. Here, click the [browse](#) button [...] associated with the [account](#) field to locate and select an account from the Active Directory, then enter the appropriate password for that account. Alternatively, you can enter new account credentials and select the [create account if it does not exist](#) check box.

5. Click [next](#) to continue; if you have chosen to create a new account, the account is created and [Exchange journaling](#) is set up for the user specified in the [account credentials](#). If you have entered details for an existing account, [required permissions are granted](#):



The screenshot shows the 'Exchange Mailbox Access Account Wizard' window. On the left, a navigation pane lists five steps: 'Welcome', 'Account Credentials', 'Create Account' (which is highlighted with a yellow square), 'Grant Rights', and 'Finish'. The main area is titled 'Create Account' and contains the following text: 'The PowerShell script below is run to create the new user account specified on the previous page.' Below this is a 'PowerShell script:' section with a text box containing the following command:

```
New-Mailbox -Name "ExclaimerEMA2" -UserPrincipalName "ExclaimerEMA2@network26.local" -Password $password -ResetPasswordOnNextLogon $false -Database "HELPDC\First Storage Group\Mailbox Database" Set-Mailbox -HiddenFromAddressListsEnabled $true -Identity "network26\ExclaimerEMA2"
```

 Below the script is a 'Result:' section with a text box containing the message: 'Successfully completed request. Click Next to continue.' At the bottom of the window are four buttons: 'Help', '< Back', 'Next >', and 'Cancel'.

Exchange Mailbox Access Account Wizard

Welcome
Account Credentials
Create Account
Grant Rights
Finish

Create Account
The PowerShell script below is run to create the new user account specified on the previous page.

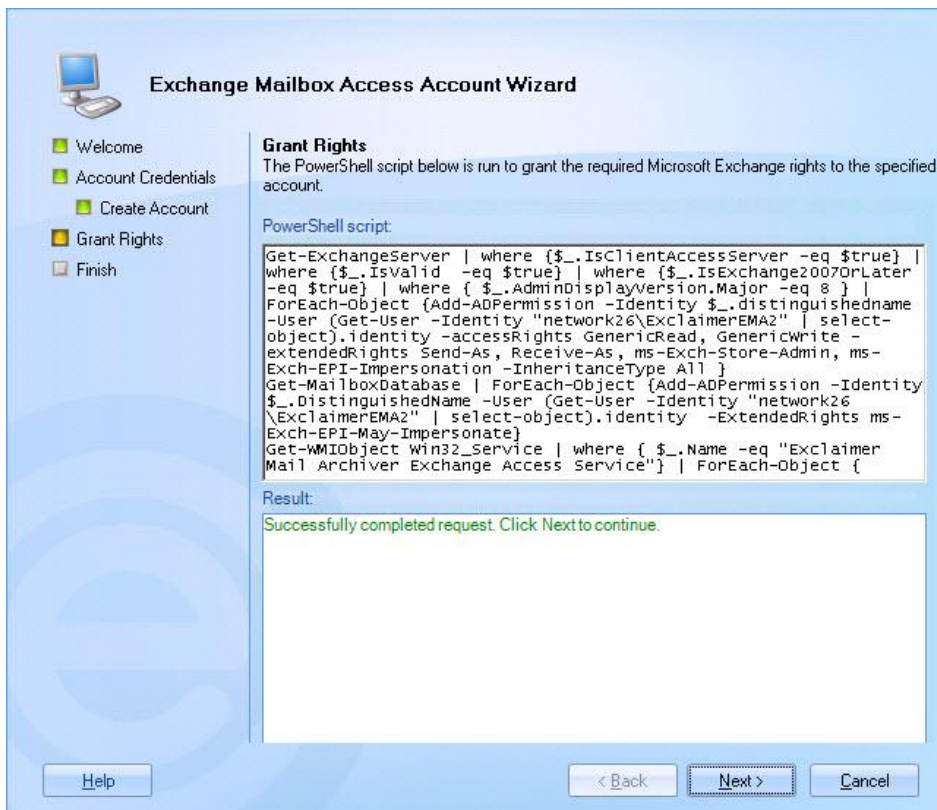
PowerShell script:

```
New-Mailbox -Name "ExclaimerEMA2" -UserPrincipalName "ExclaimerEMA2@network26.local" -Password $password -ResetPasswordOnNextLogon $false -Database "HELPDC\First Storage Group\Mailbox Database" Set-Mailbox -HiddenFromAddressListsEnabled $true -Identity "network26\ExclaimerEMA2"
```

Result:
Successfully completed request. Click Next to continue.

Help < Back Next > Cancel

6. Click [next](#) to set required permissions for the new account:



The screenshot shows the 'Exchange Mailbox Access Account Wizard' window. On the left, a navigation pane lists five steps: 'Welcome', 'Account Credentials', 'Create Account', 'Grant Rights' (which is highlighted with a yellow square), and 'Finish'. The main area is titled 'Grant Rights' and contains the following text: 'The PowerShell script below is run to grant the required Microsoft Exchange rights to the specified account.' Below this is a 'PowerShell script:' section with a text box containing the following command:

```
Get-ExchangeServer | where { $_.IsClientAccessServer -eq $true } | where { $_.IsValid -eq $true } | where { $_.IsExchange2007OrLater -eq $true } | where { $_.AdminDisplayVersion.Major -eq 8 } | ForEach-Object { Add-ADPermission -Identity $_.DistinguishedName -User (Get-User -Identity "network26\ExclaimerEMA2" | select-object).identity -accessRights GenericRead, GenericWrite -extendedRights Send-As, Receive-As, ms-Exch-Store-Admin, ms-Exch-EPI-Impersonation -InheritanceType All } Get-MailboxDatabase | ForEach-Object { Add-ADPermission -Identity $_.DistinguishedName -User (Get-User -Identity "network26\ExclaimerEMA2" | select-object).identity -ExtendedRights ms-Exch-EPI-May-Impersonate } Get-WMIObject Win32_Service | where { $_.Name -eq "Exclaimer Mail Archiver Exchange Access Service" } | ForEach-Object {
```

 Below the script is a 'Result:' section with a text box containing the message: 'Successfully completed request. Click Next to continue.' At the bottom of the window are four buttons: 'Help', '< Back', 'Next >', and 'Cancel'.

Exchange Mailbox Access Account Wizard

Welcome
Account Credentials
Create Account
Grant Rights
Finish

Grant Rights
The PowerShell script below is run to grant the required Microsoft Exchange rights to the specified account.

PowerShell script:

```
Get-ExchangeServer | where { $_.IsClientAccessServer -eq $true } | where { $_.IsValid -eq $true } | where { $_.IsExchange2007OrLater -eq $true } | where { $_.AdminDisplayVersion.Major -eq 8 } | ForEach-Object { Add-ADPermission -Identity $_.DistinguishedName -User (Get-User -Identity "network26\ExclaimerEMA2" | select-object).identity -accessRights GenericRead, GenericWrite -extendedRights Send-As, Receive-As, ms-Exch-Store-Admin, ms-Exch-EPI-Impersonation -InheritanceType All } Get-MailboxDatabase | ForEach-Object { Add-ADPermission -Identity $_.DistinguishedName -User (Get-User -Identity "network26\ExclaimerEMA2" | select-object).identity -ExtendedRights ms-Exch-EPI-May-Impersonate } Get-WMIObject Win32_Service | where { $_.Name -eq "Exclaimer Mail Archiver Exchange Access Service" } | ForEach-Object {
```

Result:
Successfully completed request. Click Next to continue.

Help < Back Next > Cancel

7. Click [next](#) to complete the wizard:



8. Click [finish](#) to exit back to the [settings](#) tab.

Exchange Mailbox Configuration (Non Microsoft Exchange Computers)

The [configure](#) button for [Exchange Mailbox Access](#) [pg.45] is used to configure a user to have authority to access [Exchange](#) mailboxes for all users. If you are running this wizard from a **non Microsoft Exchange computer**, follow the steps below.

If you are running this wizard from a **Microsoft Exchange computer**, please refer to the [Exchange Mailbox Configuration \(Standard\)](#) [pg.48] for separate instructions.

1. Having clicked the [configure](#) button, the [Exchange Mailbox Account Access Wizard](#) is launched. From here, you can choose to enter the required [account](#) and [password](#) (if known):



2. If you know of a suitable account, click the [I already have an account that meets all of the criteria above...](#) check box and enter required credentials (or you can click the [browse](#) button [...] associated with the [account](#) field to locate and select an account from the Active Directory).

3. Having done this, click [next](#) to go directly to the end of this wizard and exit. Alternatively, click [next](#) to configure an account with required permissions:



The screenshot shows the 'Exchange Mailbox Access Account Wizard' window. On the left, a navigation pane lists four steps: 'Welcome' (green square), 'Account Credentials' (yellow square), 'Grant Rights' (grey square), and 'Finish' (grey square). The main area is titled 'Account Credentials' and contains the instruction: 'Select the Exchange Mailbox Access account. The account that you specify will be:'. Below this, a bulleted list specifies the required permissions: 'Given \'logon as a service\' rights.', 'Given permission to impersonate all users in the organization.', and 'Used by the Exclaimer Exchange Mailbox Access service to log on.' There are two text input fields: 'Account:' with the value 'network26\ExclaimerEMA' and a browse button (...), and 'Password:' with the placeholder text 'Please specify a password for the account'. A checkbox labeled 'Create account if it does not exist' is checked. At the bottom, there are four buttons: 'Help', '< Back', 'Next >', and 'Cancel'.

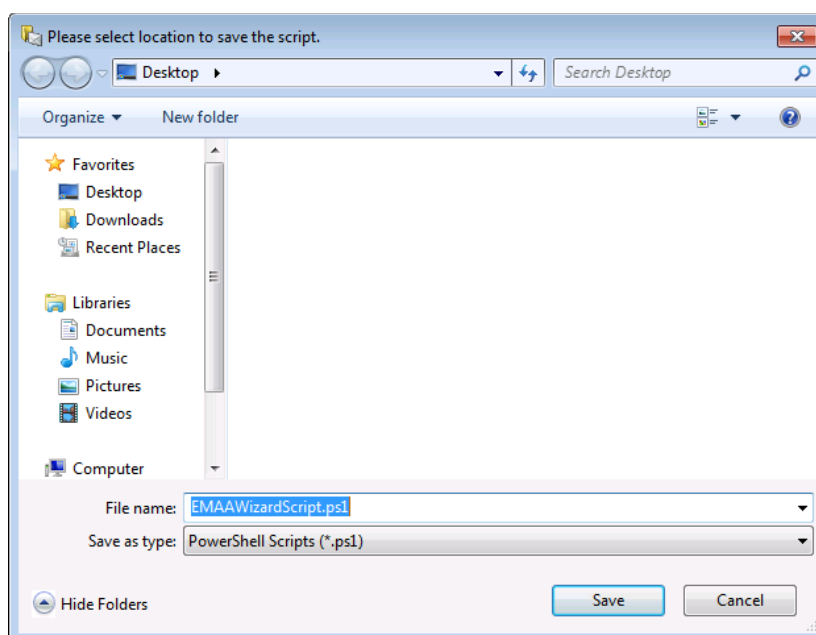
4. Here, click the [browse](#) button [...] associated with the [account](#) field to locate and select an account from the Active Directory, then enter the appropriate password for that account. Alternatively, you can enter new account credentials and select the [create account if it does not exist](#) check box.

5. Click [next](#) to access the [script generation](#) page:



From here, scripts are generated which need to be run on your [Microsoft Exchange](#) server (when you choose to generate the script, you will be prompted to choose a location for saving the script file). If you have chosen to create a new account, the script creates the account and sets up [journaling](#). If you have chosen an existing account, the script sets up journaling only.

6. Click the [generate script](#) button to generate the script and save it as a [PS1](#) file:

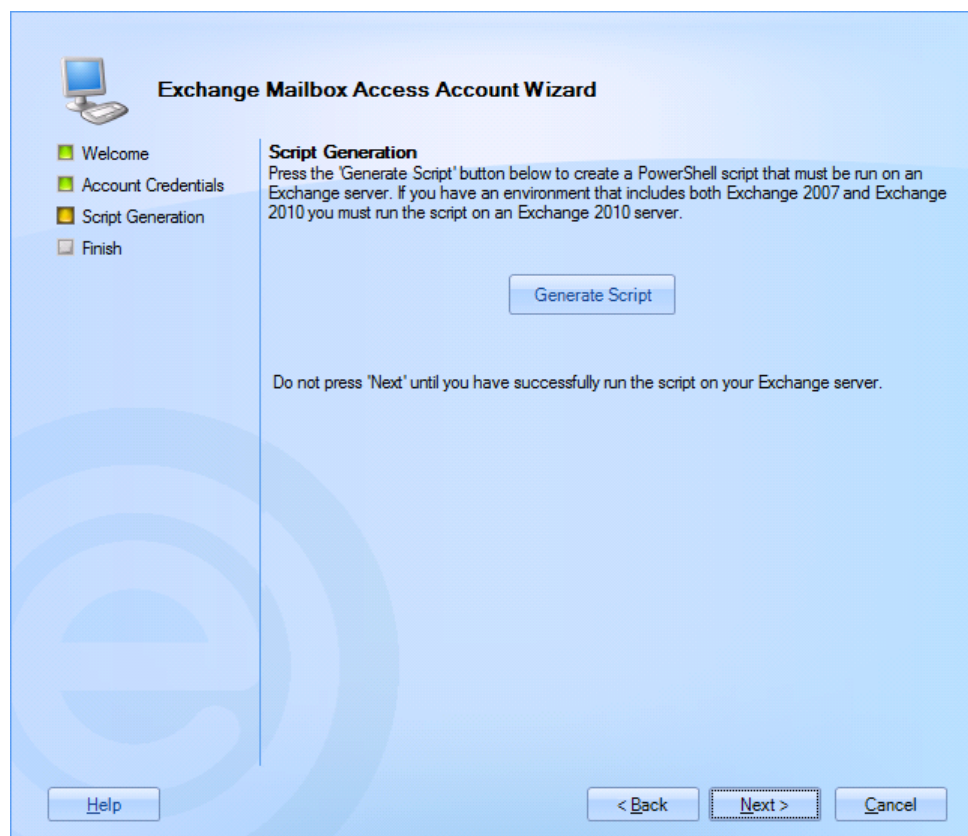


7. Select the required location for the file (choose somewhere that is easily accessible for running the script on your [Microsoft Exchange](#) server).
8. Save the file and exit back to the script generation page. **Do not click next at this point.**
9. Copy the script file to your [Microsoft Exchange](#) server.

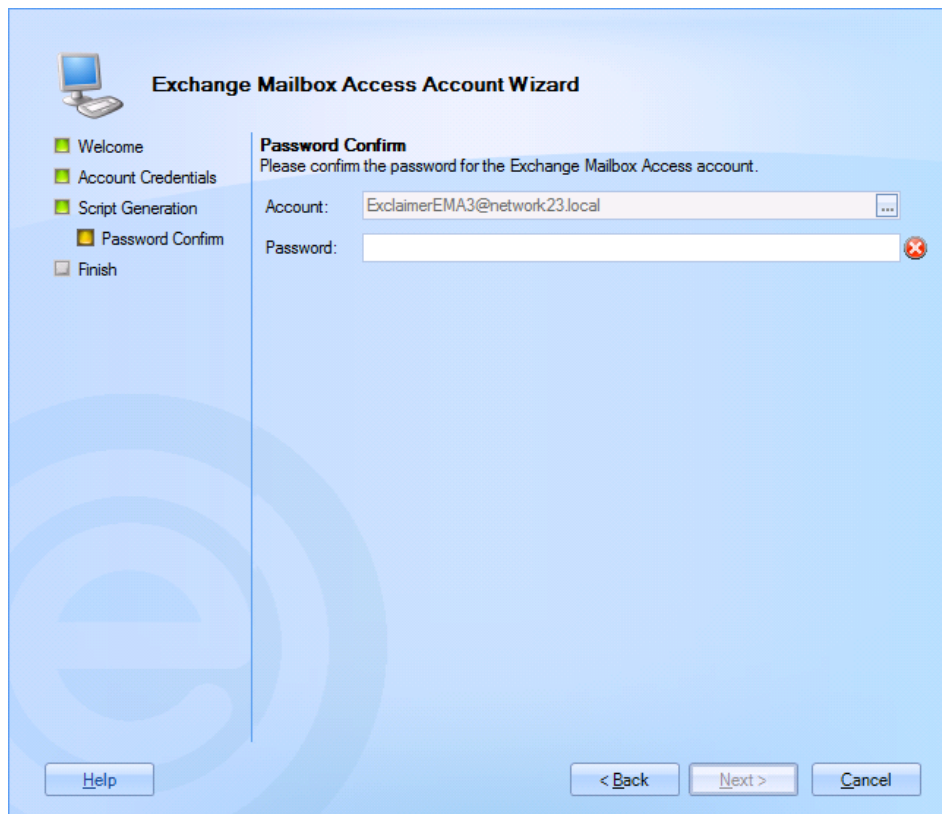
NOTE

If you have both **Microsoft Exchange 2010** and **Microsoft Exchange 2007** servers in your environment then you must run this script on the **Microsoft Exchange 2010** server.

10. On your [Microsoft Exchange](#) server, select **Start > All Programs**, then hover the cursor over [Microsoft Exchange Server](#) and click **Exchange Management Shell**.
11. Drag and drop the script file into the window and press **Enter** to run the script.
12. Return to the [Exchange Mailbox Access Account Wizard](#) on the computer where you are installing Exclaimer Mail Archiver:



13. Click [next](#) to confirm the password for the account:



The screenshot shows the 'Exchange Mailbox Access Account Wizard' window. On the left, a vertical list of steps includes 'Welcome', 'Account Credentials', 'Script Generation', 'Password Confirm' (which is highlighted with a yellow square), and 'Finish'. The main area is titled 'Password Confirm' and contains the instruction 'Please confirm the password for the Exchange Mailbox Access account.' Below this, there are two input fields: 'Account:' with the text 'ExclaimerEMA3@network23.local' and 'Password:' which is currently empty. A red 'X' icon is visible to the right of the password field. At the bottom, there are three buttons: 'Help', '< Back', and 'Next >', along with a 'Cancel' button.

14. Click [next](#) to complete the wizard:

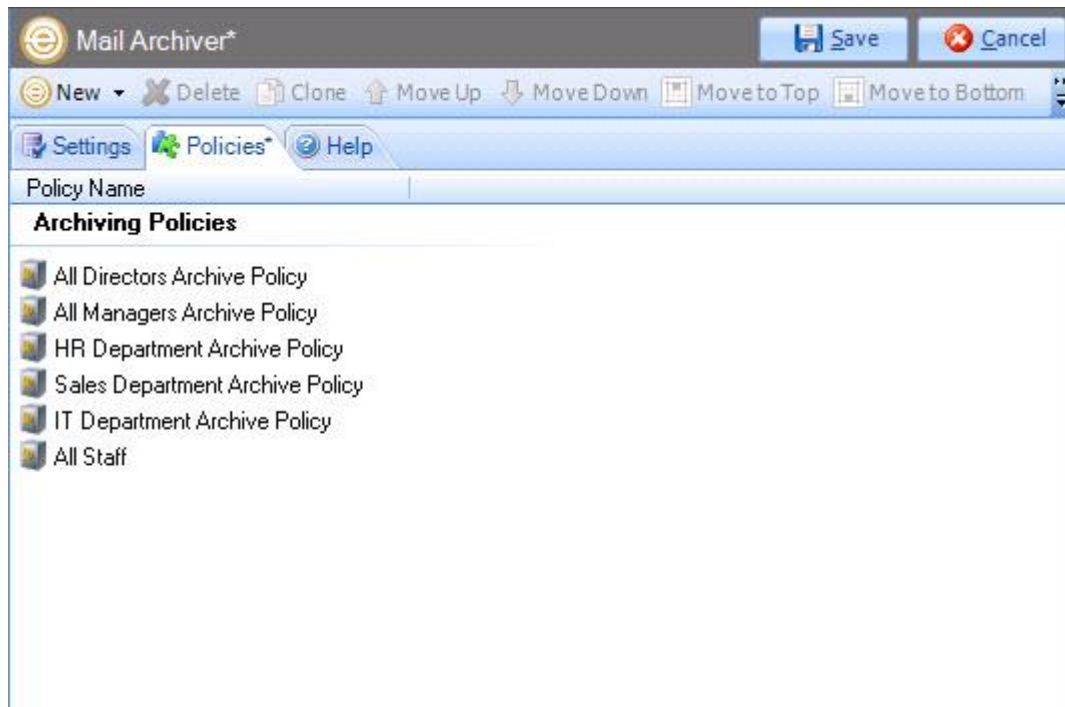


The screenshot shows the 'Exchange Mailbox Access Account Wizard' window at the 'Finish' step. The left-hand list of steps now shows 'Finish' as the active step, highlighted with a yellow square. The main area is titled 'Finish' and contains the following text: 'You have now completed the Exchange Mailbox Access account wizard.', 'The Exclaimer Exchange Mailbox Access service is now configured and has been started on this machine.', 'You should ensure that the Restore to Mailbox feature is enabled if you wish to allow your users to copy messages from the mail archive into their Exchange mailboxes.', and 'If you use the Batch Importer utility you should specify this Exchange Mailbox Access account when prompted for credentials.' At the bottom, the buttons are 'Help', '< Back', 'Finish', and 'Cancel'.

15. Click [finish](#) to exit back to the [settings](#) tab.

Mail Archiver Policies

When the [Mail Archiver](#) branch is selected in the [Exclaimer console \[pg.30\]](#) tree, you can use the [policies](#) tab for quick access to existing policies and options for completing key tasks relating to policies. Existing policies are listed in the top pane and settings for the currently selected policy are available in the lower pane:



It is important to note that policies are processed in the order that they are listed here. For example, if you decide to define policies to archive emails for each organizational department to separate stores (one archive [store \[pg.67\]](#) per department) but wish to archive emails for company managers to a separate store, it would be important to process the 'Managers' policy before any departmental policies.

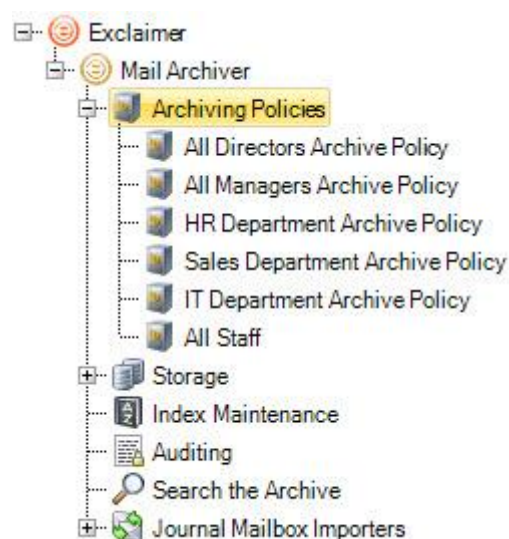
You can use [move up / move down \[pg.58\]](#) or [move to top / move to bottom \[pg.58\]](#) options to change the sequence of this list, and use [next policy \[pg.84\]](#) options for greater control over processing sequence ([next policy](#) options allow you to have email messages stored in more than one archive store if required).

Double-click any policy to access [settings and information \[pg.65\]](#). Available options from the [policies](#) tab are summarized in the following sections:

- [The policy list \[pg.58\]](#)
- [The policies toolbar \[pg.58\]](#)
- [View options \[pg.59\]](#)

The Policy List

All existing policies are listed in the main content area of the [policies](#) tab; these are the same policies, in the same sequence, that you will see listed in the console tree:



It does not matter if you access policies from the console tree or from the policy list - use whichever method is most convenient for the task in hand.

The Policies Toolbar

When the [policies](#) tab is displayed, the [policies](#) toolbar contains the following options:

Toolbar Option	Summary
New	Launch the new archiving policy wizard [pg.86] and create a new policy.
Delete	Use this option to remove [pg.94] the currently selected policy. Select a policy from the list and use this option to delete it - the policy is removed from the list but is only permanently deleted when changes are saved [pg.40].
Clone	If you need to create a policy which is similar to an existing policy, use this option to clone [pg.91] (duplicate) the existing policy and then edit [pg.92] the duplicate version as required (this is quicker than creating a new policy from first principles).
Move Up / Move Down	Use these options to reorganize the policy list and determine the order in which policies are applied. Select a policy and click move up or move down as required.
Move to Top / Move to Bottom	Use these options to quickly move the selected policy to the very top or very bottom of the list. If there are a significant number of policies in the list, this can be much quicker than using move up / move down options.

View Options

The [view](#) option can be used to determine whether policies are displayed in list ([details](#)) form...

Archiving Policies



... or as [large icons](#):

Archiving Policies



Chapter 5

Mail Archiver Policies

Introduction

Archiving [policies](#) are used to define a set of rules which determine if and then where email messages (both sent and received) are archived.

Every [policy](#) is associated with a [store](#) [pg.110], so you can specify where email messages (which meet given criteria for that [policy](#)) will be archived. Additionally, a wide range of [conditions](#) [pg.68] and [exceptions](#) [pg.76] can be specified to control the circumstances under which a [policy](#) is applied. For example, you might need to apply different [policies](#) for different departments within your organization, or for individual staff members, or perhaps based upon the content or subject line of messages received. You can also use [date range](#) [pg.81] options to create [policies](#) which are only triggered at certain times and use [next policy](#) [pg.84] options to create a series of connected rules.

This section contains information for working with [policies](#), including:

- [Accessing existing policies](#) [pg.62]
- [The anatomy of a policy](#) [pg.65]
- [Adding a policy](#) [pg.86]
- [Cloning a policy](#) [pg.91]
- [Changing a policy](#) [pg.92]
- [Enabling and disabling a policy](#) [pg.93]
- [Removing a policy](#) [pg.94]

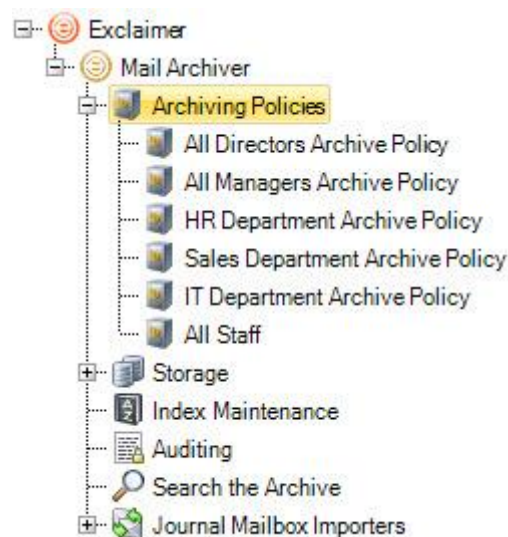
You can also learn more about specific tasks, using the [how to](#) [pg.95] section for [policies](#).

Accessing Existing Policies

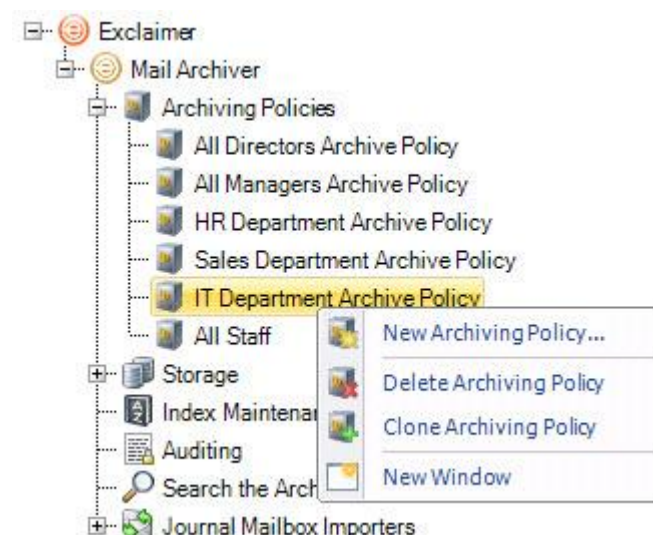
Within [Exclaimer Mail Archiver](#), all [policies](#) are accessed via the [Exclaimer console tree](#) [pg.62], or by using [policy tabs](#) [pg.63] from other branches of the console tree.

Navigating Policies Using the Console Tree

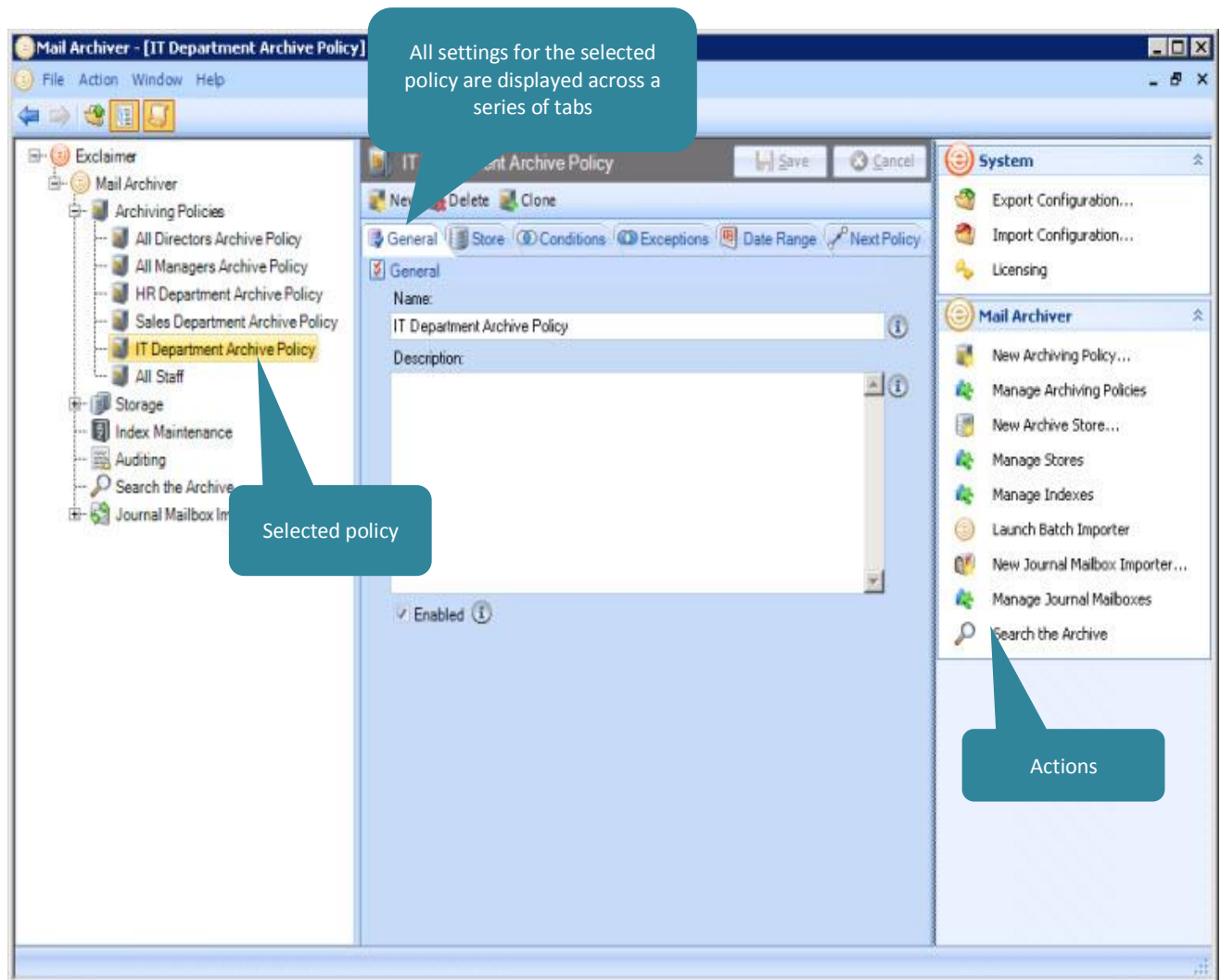
All work with [policies](#) is completed from the [Archiving Policies](#) branch of the [Exclaimer console tree](#) [pg.31]:



From here you can view any existing [policies](#) (as child branches within the tree). Select any [policy](#) from the tree and right-click to view actions that can be taken:



Having selected a policy from the tree, use the content pane to access all setup options and actions:

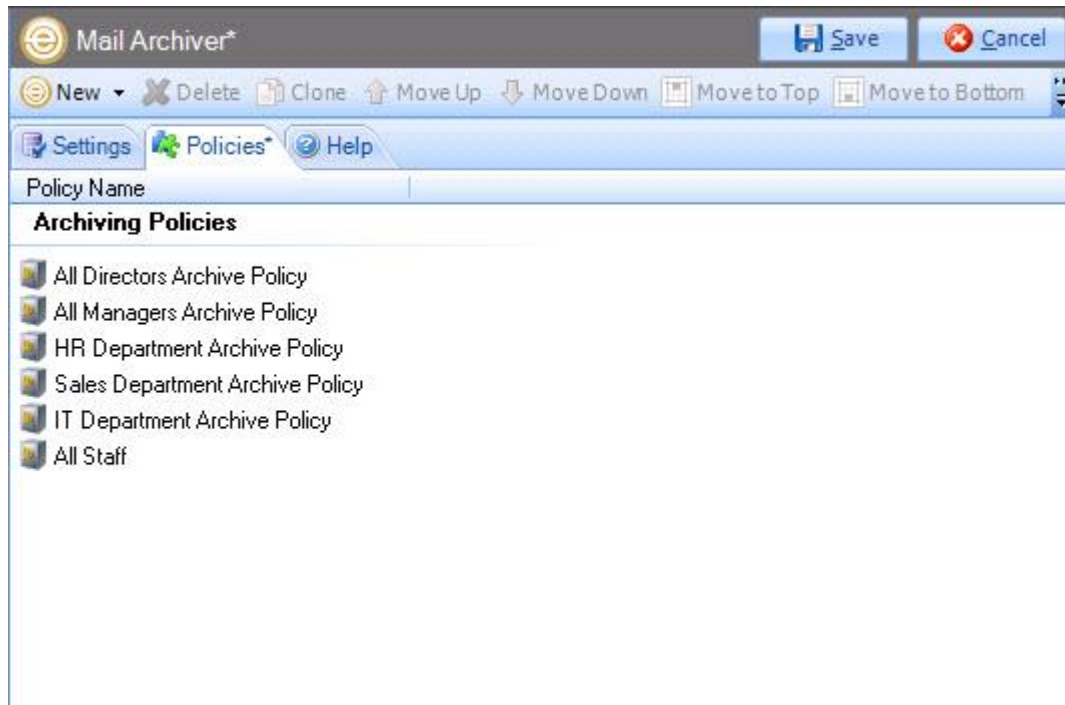


NOTE

See [the anatomy of a policy \[pg.65\]](#) for further information about policy setup options.

Navigating Policies Using Policy Tabs

Existing [policies](#) can also be accessed from other branches of the console tree, via a [policy](#) tab in the content pane:



The [policy](#) tab is available from the [Mail Archiver](#) branch and also from the [archiving policies](#) branch. Alternatively, select the [manage archiving policies](#) option from the [actions](#) pane.

The sequence in which policies are listed here is the same as the sequence shown in the console tree. **It is important to note that policies are processed in the order that they are listed here.** You can use [move up](#) / [move down](#) or [move to top](#) / [move to bottom](#) options to change the sequence of this list, and use [next policy](#) [pg.84] options for greater control over processing sequence.

The Anatomy of a Policy

An [Archiving policy](#) includes a range of settings which determine if and then where email messages (both sent and received) are archived. These settings are organized across a series of tabs, displayed in the content pane when a [policy](#) is selected:



Click a tab (above) or use links below to learn more about these options:

- [General](#) [pg.66]
- [Store](#) [pg.67]
- [Conditions](#) [pg.68]
- [Exceptions](#) [pg.76]
- [Date range](#) [pg.81]
- [Next policy](#) [pg.84]

The Anatomy of a Policy - General

Options on the [general](#) tab are used to define basic information for a [policy](#). These settings determine how the [policy](#) is displayed throughout the system, and whether or not the [policy](#) is active:



Options on this tab are summarized below:

Option	Summary
Name	Each policy must have a unique name. The name entered here is displayed in the Exclaimer console tree [pg.31], and on any other policy lists. When a message meets this policy conditions [pg.68] and is archived, this name is recorded as an event log entry [pg.171].
Description	This field can be used to add any useful information for the policy - for example, usage notes, version history, background or explanatory information. The first line of description text is displayed in any policy lists [pg.63] (but not the console tree).
Enabled	Select this option to activate the policy . If a policy is not enabled, it will not be applied to any messages being processed by Exclaimer Mail Archiver .

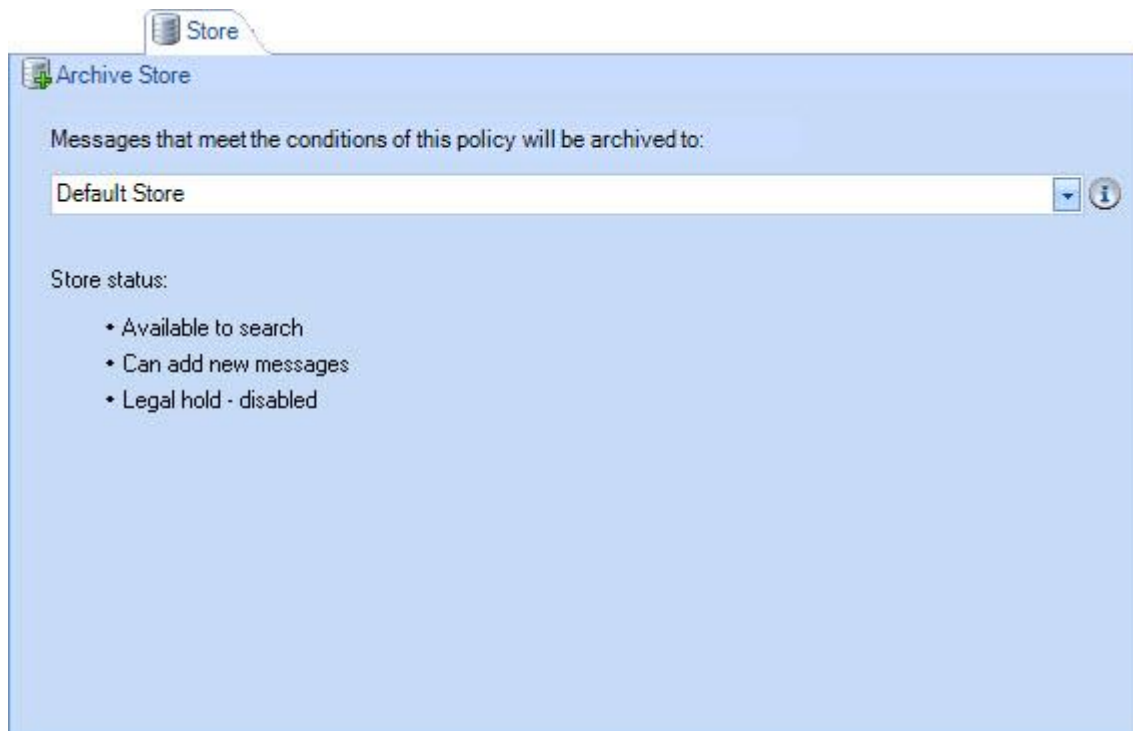
NOTE

Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the **save** button to [save changes](#) [pg.40] across all tabs. Alternatively, use the **cancel** button to abandon all changes.

The Anatomy of a Policy - Store

The **store** tab is used to specify the **store** that will be used to archive messages which meet criteria defined in the **policy** (i.e. messages which match specified [conditions](#) [pg.68] and fall within a given [date range](#) [pg.81] and do not trigger any [exceptions](#) [pg.76]).

If multiple **stores** have been defined, they will be available for selection in a drop-down list. The current status of the selected **store** is summarized at the bottom of this tab:



For further information about **stores** (including instructions for [adding a new store](#) [pg.125], [removing an existing store](#) [pg.133] and changing [settings](#) [pg.114]) please refer to the [storage](#) [pg.110] section of this guide.

NOTE

Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the **save** button to [save changes](#) [pg.40] across all tabs. Alternatively, use the **cancel** button to abandon all changes.

The Anatomy of a Policy - Conditions

The **conditions** tab is used to set [criteria](#) [pg.70] which determines the circumstances under which a **policy** is applied:

The screenshot shows the 'Conditions' tab of a policy configuration window. At the top, there's a tab labeled 'Conditions'. Below it, a section titled 'Select condition(s)' contains a list of conditions with checkboxes. The first condition, 'All Messages', is checked. Below this list, a text area shows the resulting policy: 'Policy applies to all messages.' At the bottom, there are two radio buttons: 'Apply policy when all conditions are met' (which is selected) and 'Apply policy when any condition is met'.

Conditions

Select condition(s)

- ☒ All Messages
- ☐ The Sender is someone
- ☐ The Recipient is someone
- ☐ The Subject contains specific words or phrases
- ☐ The Body contains specific words or phrases
- ☐ One or more message headers contains specific words or character sequences
- ☐ The Message is a Meeting Request, Update or Response
- ☐ The Message is a Task Request or Update
- ☐ No previous policy of this type has been applied

Edit a condition by clicking an underlined value

Policy applies to all messages.

☒ Apply policy when all conditions are met

☐ Apply policy when any condition is met

Once a **condition** is selected, any [options](#) [pg.70] for that **condition** are displayed as hyperlinks in the lower pane - select these links to refine the **condition**. For instance, selecting the [someone](#) link displays further options to refine the **sender is someone** condition:

This screenshot shows the same 'Conditions' tab as before, but with 'The Sender is someone' selected. A callout bubble points to this selected condition with the text 'Selected condition'. Another callout bubble points to the word 'someone' in the text 'The sender is someone.' with the text 'Use hyperlinks to set criteria for the condition'. A third callout bubble points to the radio buttons at the bottom with the text 'If multiple conditions are set, choose whether ALL conditions must be met to trigger the policy or if just one is enough'.

Select condition(s)

Selected condition

- ☐ All Messages
- ☒ The Sender is someone
- ☐ The Recipient is someone
- ☐ The Subject contains specific words or phrases
- ☐ The Body contains specific words or phrases
- ☐ One or more message headers contains specific words or character sequences
- ☐ The Message is a Meeting Request, Update or Response

Edit a condition by clicking an

Use hyperlinks to set criteria for the condition

Policy applies to messages where:

The sender is [someone](#).

☒ Apply policy when all conditions are met

☐ Apply policy when any condition is met

If multiple conditions are set, choose whether ALL conditions must be met to trigger the policy or if just one is enough

Each time a selection is made, confirmation of the selection and any further [options](#) [pg.70] are displayed in the lower pane.

NOTE

At least one **condition** must be set to apply a policy. If a **condition** is not selected, the default **condition** of **all messages** is used. See the [conditions - options summary](#) [pg.70] page for a summary of available **conditions**.

Available Options for Setting Conditions

When working with [conditions](#) [pg.68] for a policy, the following options are available:

- ☒ All Messages
- ☐ The Sender is someone
- ☐ The Recipient is someone
- ☐ The Subject contains specific words or phrases
- ☐ The Body contains specific words or phrases
- ☐ One or more message headers contains specific words or character sequences
- ☐ The Message is a Meeting Request, Update or Response
- ☐ The Message is a Task Request or Update
- ☐ No previous policy of this type has been applied

When a [condition](#) is selected, further options are available, as summarized below:

- [All messages](#) [pg.71]
- [The sender is someone](#) [pg.71]
 - [The sender is a specific user](#) [pg.71]
 - [The sender is a member of an Active Directory group](#) [pg.71]
 - [The sender is a member of an Active Directory domain or organizational unit](#) [pg.71]
 - [The sender has one or more specific Active Directory attributes](#) [pg.71]
 - [The sender address contains specific character sequences](#) [pg.71]
 - [The sender is inside or outside the organization](#) [pg.71]
 - [The sender is an Active Directory contact](#) [pg.71]
- [The recipient is someone](#) [pg.71]
 - [The recipient is a specific user or distribution group](#) [pg.71]
 - [The recipient is a member of an Active Directory group](#) [pg.72]
 - [The recipient is a member of an Active Directory domain or organizational unit](#) [pg.72]
 - [The recipient has one or more specific Active Directory attributes](#) [pg.72]
 - [The recipient address contains specific character sequences](#) [pg.72]
 - [The recipient is inside or outside the organization](#) [pg.72]
 - [The recipient is an Active Directory contact](#) [pg.72]
 - [The recipient is in the To or Cc field of the message](#) [pg.72]
- [The subject contains specific words or phrases](#) [pg.72]
- [The body contains specific words or phrases](#) [pg.72]
- [One or more message headers contain specific words or character sequences](#) [pg.73]
- [The message is a meeting request, update or response](#) [pg.73]
- [The message is a task request or update](#) [pg.73]
- [No previous policy of this type has been applied](#) [pg.73]

All Messages

This is a blanket or 'wildcard' condition which will apply the policy to all messages.

The Sender Is Someone

When selected, a [someone](#) link is displayed in the lower pane; use this link to access further options, as summarized in the following sections.

The sender is a specific user

Use the [specific user](#) link to browse and select a user from the user list.

The sender is a member of an Active Directory group

Use the [Active Directory group](#) link to browse and select the required group from a list of Active Directory groups.

The sender is a member of an Active Directory domain or organizational unit

Use the [domain](#) or [organizational unit](#) link to browse and select the required domain or unit from a container list.

The sender has one or more specific Active Directory attributes

Use the [Active Directory attribute values](#) link to open the [configure attributes window](#) [pg.74] to define LDAP queries to be resolved for matching.

The sender address contains specific character sequences

Use the [character sequences](#) link to define character sequences to be matched in the sender's email address.

The sender is inside or outside the organization

Use the [inside](#) link to match messages where the sender is either internal or external to the organization.

The sender is an Active Directory contact

Use the [is / is not](#) link to specify whether external addresses which have (or do not have) an AD contact will trigger the policy.

The Recipient Is Someone

When selected, a [someone](#) link is displayed in the lower pane; use this link to access further options, as summarized in the following sections.

The recipient is a specific user or distribution group

Use the [list of users or distribution lists](#) link to browse and select a user or distribution list from the user list.

The recipient is a member of an Active Directory group

Use the [Active Directory group](#) link to browse and select the required group from a list of Active Directory groups.

The recipient is a member of an Active Directory domain or organizational unit

Use the [domain or organizational unit](#) link to browse and select the required domain or unit from a container list.

The recipient has one or more specific Active Directory attributes

Use the [Active Directory attribute values](#) link to open the [configure attributes window](#) [pg.74] to define LDAP queries to be resolved for matching.

The recipient address contains specific character sequences

Use the [character sequences](#) link to define character sequences to be matched in the sender's email address.

The recipient is inside or outside the organization

Use the [inside](#) link to match messages where the recipient is either internal or external to the organization.

The recipient is an Active Directory contact

Use the [is / is not](#) link to specify whether external addresses which have (or do not have) an AD contact will trigger the policy.

The recipient is in the to or cc field of the message

Use the [to or cc](#) field to match messages where the recipient is in the [to or the cc](#) field of the email, or where the recipient is only in the [to](#) field, or where the recipient is only in the [cc](#) field.

The Subject Contains Specific Words or Phrases

Use the [words or phrases](#) link to specify given words or phrases to be matched in the message subject line. Use the [words or phrases](#) window to enter required items to be matched. If a single entry contains multiple words, it is considered to be a phrase. Use check boxes at the bottom of the window to choose whether matching should take place if any or all words/phrases are matched, and whether matching is case sensitive.

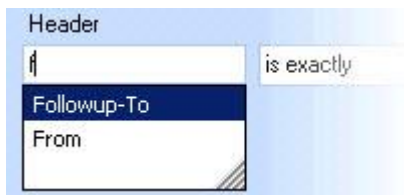
The Body Contains Specific Words or Phrases

Use the [words or phrases](#) link to specify given words or phrases to be matched in the message body. Use the [words or phrases](#) window, as described above.

One or More Message Headers Contains Specific Words or Character Sequences

Match messages based on message header fields. Use [message headers](#) and [words or character sequences](#) links to enter header fields and values to be matched.

The [header](#) field uses [intellisense](#) for common message header fields; therefore it suggests an entry based on what you type. For example, if you type the letter 'I' into this field, the header 'Importance' is suggested, whereas if you type 'f' into the field, the 'Followup-To' and 'From' headers are suggested:



The Message Is a Meeting Request, Update or Response

Match messages if they are a meeting request, an updated meeting request, or a response to a meeting request.

The Message is a Task Request or Update

Match messages if they are a task request or an update to a task request.

No Previous Policy Of This Type Has Been Applied

Use this as a 'catch all' condition. This is commonly used as the condition for a final policy in a [policy chain](#) [pg.84].

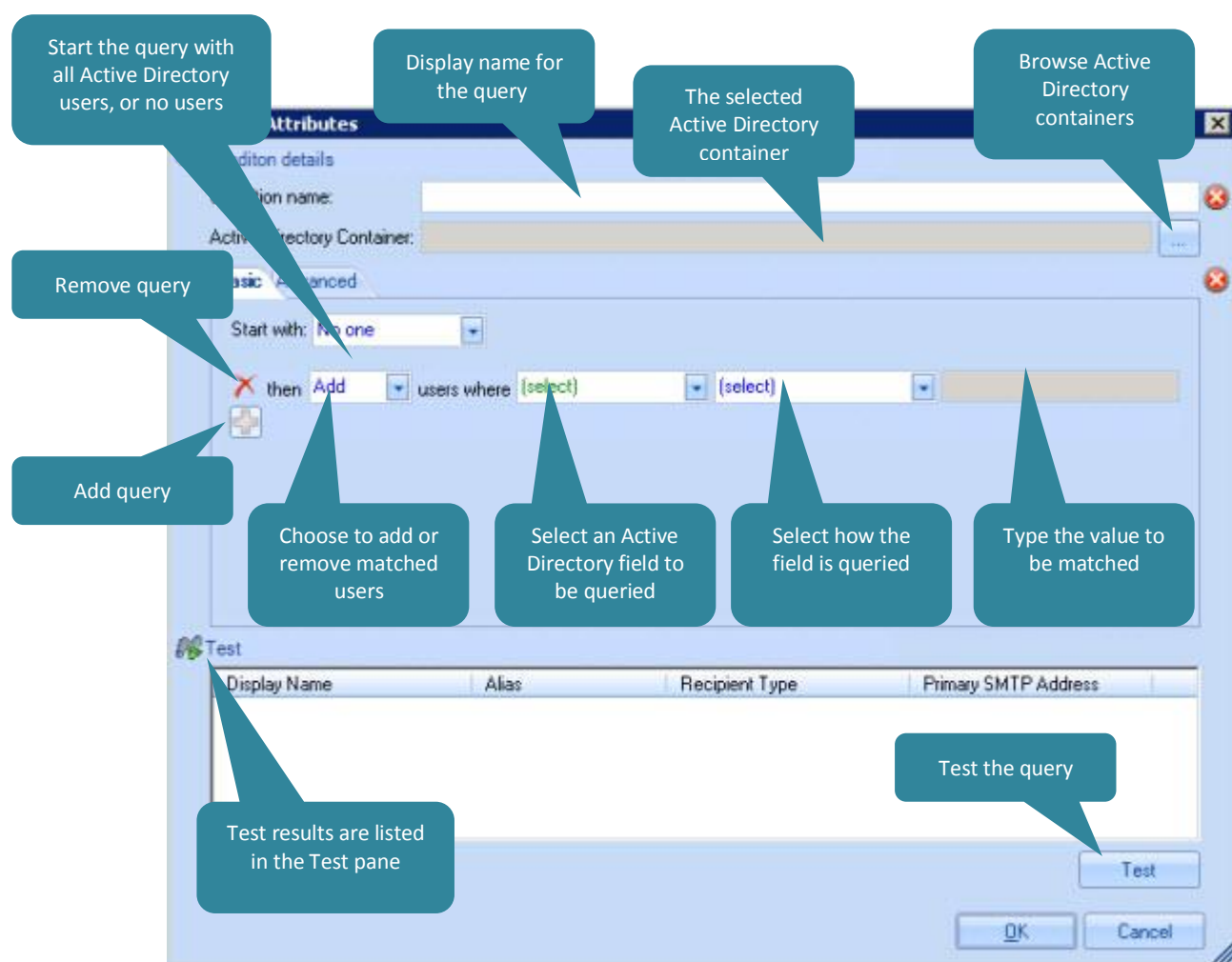
NOTE

At least one condition must be set when a policy is defined. If a condition is not selected, the default condition of **all messages** is used.


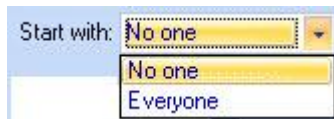



Creating Queries with the Configure Attributes Window

The `configure attributes` window allows you to define [conditions](#) [pg.68] and [exceptions](#) [pg.76] based on queries that are run on Active Directory user attributes - for example, you might want to define a policy to match all users within a given department, or a specific country, or with a certain manager.

With `Exclaimer Mail Archiver`, you can define queries based upon the full range of Active Directory attributes. The `configure attributes` window is opened when defining a [condition](#) [pg.68] or an [exception](#) [pg.76] using the `sender/recipient is someone` and then the `sender/recipient has one or more specific Active Directory attributes` options:



These options are summarized below:

Field	Summary
Condition name	<p>Enter a name for this query. This name is displayed in the main condition/exception window:</p>  <p>It is advisable to specify a name that summarizes the purpose of the query. For example, if you have multiple administrators, you may choose to add version change dates here.</p>
Active Directory container	Use the browse button to select an Active Directory container, or leave blank to search the entire Active Directory.
Start with	<p>Choose to start the query with no one (so the query will start with nothing and add matched users) or everyone (so the query will start with all Active Directory users and remove matched users):</p> 
	Use this icon to remove a query line.
	Use this icon to add a new query line.
then...	<p>Choose to add or remove matched users:</p>  <p>Defaults to add if you have chosen to start with no one and remove if you have chosen to start with everyone).</p>
users where...	Select the Active Directory field to be queried, then how it should be queried (equal to , does not equal , starts with , ends with , etc.) and finally enter a value to be matched against.
Test	Use the test option to run the query and view matched users in the test pane.

NOTE

See [how do I create a policy based upon specific Active Directory attributes? \[pg.100\]](#) for a working example of a policy based on an attribute query.

The Anatomy of a Policy - Exceptions

Exceptions are used to specify any exceptions to [conditions](#) [pg.68] which have been set. For example, if you have defined a **condition** to match everyone within a given department, you might define an **exception** to exclude individual people within that department. Use the **exceptions** tab to set required [criteria](#) [pg.77]:

Exceptions*

Select exception(s) ⓘ

- ☒ The Sender is someone
- ☐ The Recipient is someone
- ☐ The Subject contains specific words or phrases
- ☐ The Body contains specific words or phrases
- ☐ One or more message headers contains specific words or character sequences
- ☐ The Message is a Meeting Request, Update or Response
- ☐ The Message is a Task Request or Update
- ☐ No previous policy of this type has been applied

Edit an exception by clicking an underlined value

Policy DOES NOT apply to messages where:

☒ Do not apply policy when all conditions are met

☐ Do not apply policy when any condition is met

Once an exception is selected, any [options](#) [pg.77] for that exception are displayed as hyperlinks in the lower pane - select these links to refine the exception. For instance, selecting the [someone](#) link in the example above displays further options to refine the [sender is someone](#) exception.

Each time a selection is made, confirmation of the selection and any further [options](#) [pg.77] are displayed in the lower pane.

NOTE

See the [exceptions - options summary](#) [pg.77] page for a summary of available exceptions.

Available Options for Setting Exceptions

When working with [exceptions](#) [pg.76] for a policy, the following options are available:

- ☐ The Sender is someone
- ☐ The Recipient is someone
- ☐ The Subject contains specific words or phrases
- ☐ The Body contains specific words or phrases
- ☐ One or more message headers contains specific words or character sequences
- ☐ The Message is a Meeting Request, Update or Response
- ☐ The Message is a Task Request or Update
- ☐ No previous policy of this type has been applied

When an [exception](#) is selected, further options are available, as summarized below:

- [The sender is someone](#) [pg.78]
 - [The sender is a specific user](#) [pg.78]
 - [The sender is a member of an Active Directory group](#) [pg.78]
 - [The sender is a member of an Active Directory domain or organizational unit](#) [pg.78]
 - [The sender has one or more specific Active Directory attributes](#) [pg.78]
 - [The sender address contains specific character sequences](#) [pg.78]
 - [The sender is inside or outside the organization](#) [pg.78]
 - [The sender is an Active Directory contact](#) [pg.78]
- [The recipient is someone](#) [pg.78]
 - [The recipient is a specific user or distribution group](#) [pg.78]
 - [The recipient is a member of an Active Directory group](#) [pg.79]
 - [The recipient is a member of an Active Directory domain or organizational unit](#) [pg.79]
 - [The recipient has one or more specific Active Directory attributes](#) [pg.79]
 - [The recipient address contains specific character sequences](#) [pg.79]
 - [The recipient is inside or outside the organization](#) [pg.79]
 - [The recipient is an Active Directory contact](#) [pg.79]
 - [The recipient is in the To or Cc field of the message](#) [pg.79]
- [The subject contains specific words or phrases](#) [pg.79]
- [The body contains specific words or phrases](#) [pg.79]
- [One or more message headers contain specific words or character sequences](#) [pg.80]
- [The message is a meeting request, update or response](#) [pg.80]
- [The message is a task request or update](#) [pg.80]
- [No previous policy of this type has been applied](#) [pg.80]

The Sender Is Someone

When selected, a [someone](#) link is displayed in the lower pane; use this link to access further options, as summarized in the following sections.

The sender is a specific user

Use the [specific user](#) link to browse and select a user from the user list.

The sender is a member of an Active Directory group

Use the [Active Directory group](#) link to browse and select the required group from a list of Active Directory groups.

The sender is a member of an Active Directory domain or organizational unit

Use the [domain or organizational unit](#) link to browse and select the required domain or unit from a container list.

The sender has one or more specific Active Directory attributes

Use the [Active Directory attribute values](#) link to open the [configure attributes window](#) [pg.74] to define LDAP queries to be resolved for matching.

The sender address contains specific character sequences

Use the [character sequences](#) link to define character sequences to be matched in the sender's email address.

The sender is inside or outside the organization

Use the [inside](#) link to match messages where the sender is either internal or external to the organization.

The sender is an Active Directory contact

Use the [is / is not](#) link to specify whether external addresses which have (or do not have) an AD contact will trigger the policy.

The Recipient Is Someone

When selected, a [someone](#) link is displayed in the lower pane; use this link to access further options, as summarized in the following sections.

The recipient is a specific user or distribution group

Use the [list of users or distribution lists](#) link to browse and select a user or distribution list from the user list.

The recipient is a member of an Active Directory group

Use the [Active Directory group](#) link to browse and select the required group from a list of Active Directory groups.

The recipient is a member of an Active Directory domain or organizational unit

Use the [domain or organizational unit](#) link to browse and select the required domain or unit from a container list.

The recipient has one or more specific Active Directory attributes

Use the [Active Directory attribute values](#) link to open the [configure attributes window](#) [pg.74] to define LDAP queries to be resolved for matching.

The recipient address contains specific character sequences

Use the [character sequences](#) link to define character sequences to be matched in the sender's email address.

The recipient is inside or outside the organization

Use the [inside](#) link to match messages where the recipient is either internal or external to the organization.

The recipient is an Active Directory contact

Use the [is / is not](#) link to specify whether external addresses which have (or do not have) an AD contact will trigger the policy.

The recipient is in the To or Cc field of the message

Use the [to or cc](#) field to match messages where the recipient is in the [to or the cc](#) field of the email, or where the recipient is only in the [to](#) field, or where the recipient is only in the [cc](#) field.

The Subject Contains Specific Words or Phrases

Use the [words or phrases](#) link to specify given words or phrases to be matched in the message subject line. Use the [words or phrases](#) window to enter required items to be matched. If a single entry contains multiple words, it is considered to be a phrase. Use check boxes at the bottom of the window to choose whether matching should take place if any or all words/phrases are matched, and whether matching is case sensitive.

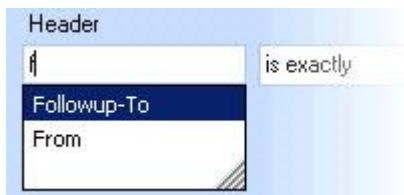
The Body Contains Specific Words or Phrases

Use the [words or phrases](#) link to specify given words or phrases to be matched in the message body. Use the [words or phrases](#) window, as described above.

One or More Message Headers Contains Specific Words or Character Sequences

Match messages based on message header fields. Use [message headers](#) and [words or character sequences](#) links to enter header fields and values to be matched.

The [header](#) field uses intellisense for common message header fields, therefore it suggests an entry based on what you type. For example, if you type the letter 'I' into this field, the header 'Importance' is suggested, whereas if you type 'f' into the field, the 'Followup-To' and 'From' headers are suggested:



The Message Is a Meeting Request, Update or Response

Match messages if they are a meeting request, an updated meeting request, or a response to a meeting request.

The Message Is a Task Request or Update

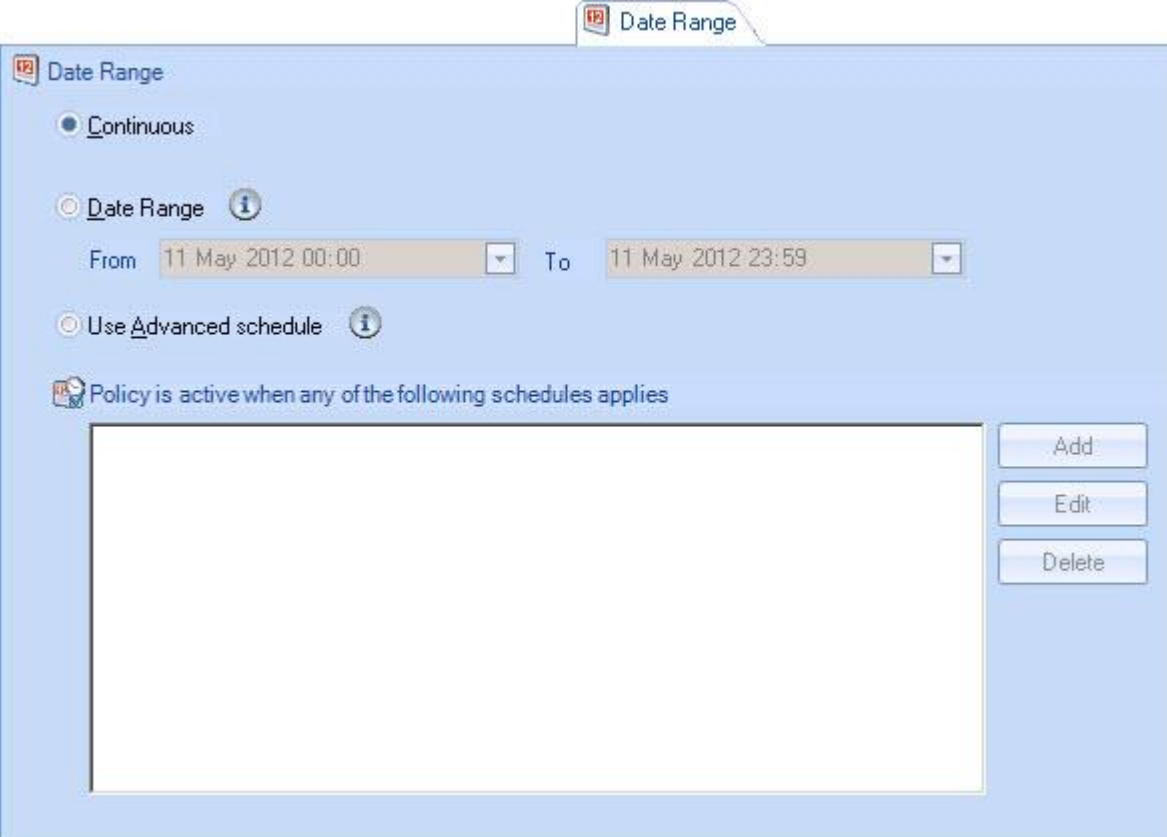
Match messages if they are a task request or an update to a task request.

No Previous Policy of This Type Has Been Applied

Use this as a 'catch all' condition. This is commonly used as the condition for a final policy in a [policy chain](#) [pg.84].

The Anatomy of a Policy - Date Range

Options on the [date range](#) tab are used to set any date / time limitations for a [policy](#):



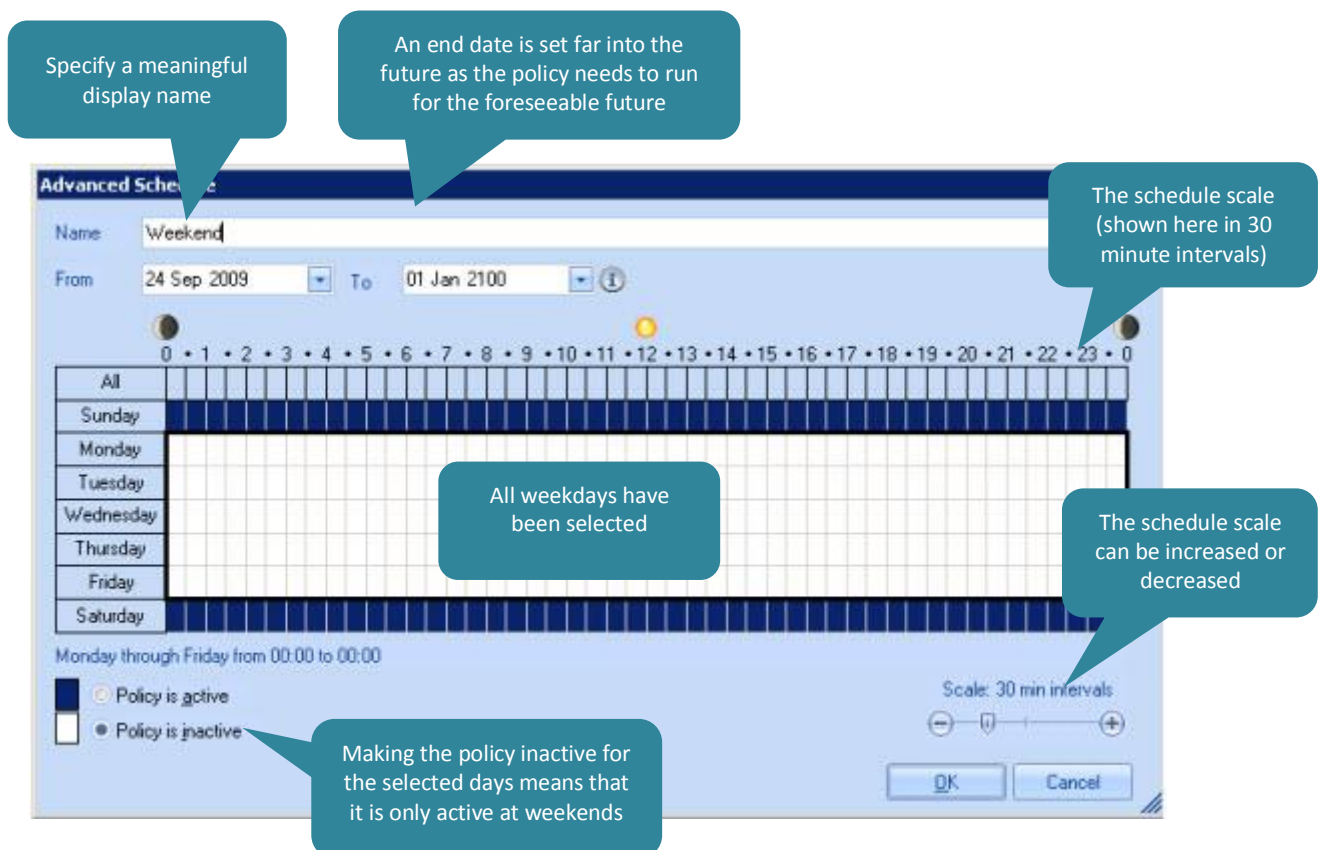
The screenshot shows a 'Date Range' configuration window. At the top, there is a tab labeled 'Date Range'. Below the tab, there are three radio button options: 'Continuous' (selected), 'Date Range' (with an information icon), and 'Use Advanced schedule' (with an information icon). The 'Date Range' option is active, showing a 'From' date of '11 May 2012 00:00' and a 'To' date of '11 May 2012 23:59'. Below these options, there is a section titled 'Policy is active when any of the following schedules applies' with a large empty rectangular box for listing schedules. To the right of this box are three buttons: 'Add', 'Edit', and 'Delete'.

By default, the [date range](#) tab is set to [continuous](#), which means that there are no date or time restrictions associated with the [policy](#). Alternatively, specific [to](#) and [from](#) dates can be set so that the [policy](#) has a start/end time, or a detailed [schedule](#) can be set.

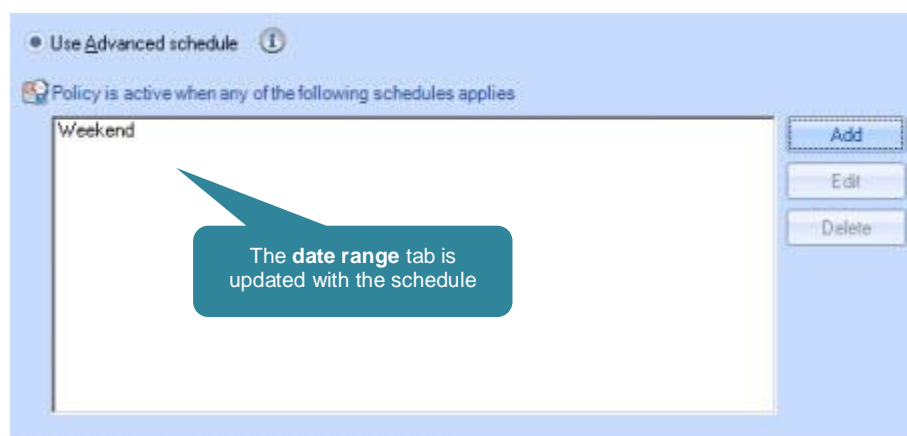
Using the Advanced Schedule

The [advanced schedule](#) works by selecting days of the week that the [policy](#) is active or inactive. Each day is split into time intervals, which can be adjusted using a sliding scale at the bottom of the window; this means that policies can be set to run on precise days at precise times.

To use the [advanced schedule](#), click the [use advanced schedule](#) radio button and then click [add](#). The example below shows how the schedule is used to create a policy that is only active at weekends:



Having made required date and time selections, click [OK](#) to exit back to the updated [date range](#) tab:



To update an existing schedule, select its name and click [edit](#). Similarly, click [delete](#) to remove the selected schedule.

NOTE

Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the **save** button to [save changes](#) [pg.40] across all tabs. Alternatively, use the **cancel** button to abandon all changes.

The Anatomy of a Policy - Next Policy

If you have a number of [policies](#) which are dependent upon each other, you can create a 'policy chain' using the [next policy](#) tab:



Whilst you control the sequence in which [policies](#) are processed using the [policy tab](#) [pg.58], the [next policy](#) tab allows you to define specific 'policy chains' based on whether the previous [policy](#) in the chain is or is not applied. These options are:

If this [policy](#) is applied then:

- Process the next archiving [policy](#)
- Don't process any more archiving [policies](#)

If this [policy](#) is not applied then:

- Process the next archiving [policy](#)
- Don't process any more archiving [policies](#)

If this [policy](#) is not applied because an exception was matched:

- Process the next archiving [policy](#)
- Don't process any more archiving [policies](#)

The first two options allow users to specify whether or not [Exclaimer Mail Archiver](#) should continue to process [policies](#) if this [policy](#) is or is not applied. The third option can be used in cases where a number of [policies](#) are defined but you have a common exception. Rather than adding this exception

to every [policy](#), this option allows users to define required exception(s) in the first [policy](#) and then choose a course of action.

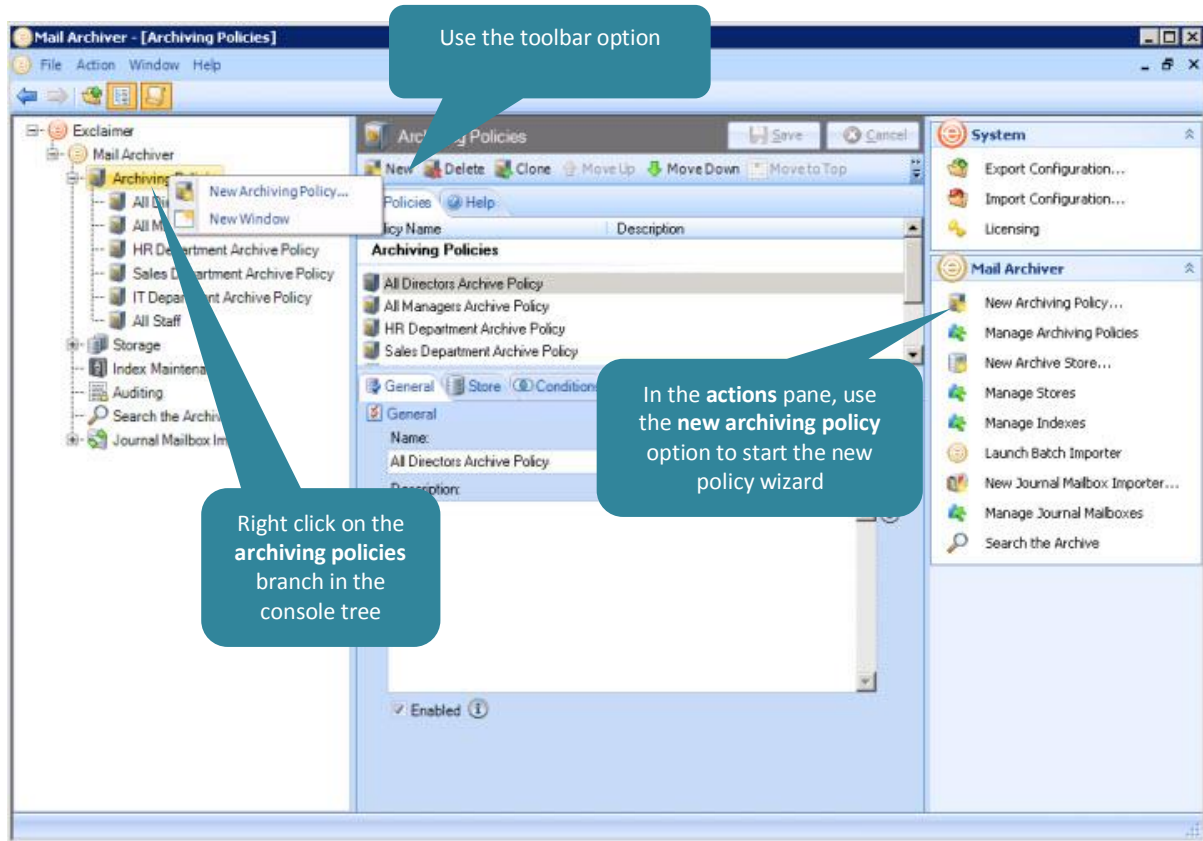
For example, if an [anti-spam](#) product is configured to add the text [\[SPAM\]](#) to the subject line of messages identified as being spam, the first [Mail Archiver policy](#) could be defined with an exception of 'any messages with [\[SPAM\]](#) in the subject line' and [next policy](#) options set to [if this policy is not applied because an exception was matched](#) then [don't process any more archiving policies](#) so any messages with [\[SPAM\]](#) in the subject would not be archived.

NOTE

Unless a next policy option is set to **don't process anymore archiving policies**, **Exclaimer Mail Archiver** will continue to process policies in the [policy list \[pg.61\]](#).

Adding Archiving Policies

Policies are added using the [new archiving policy wizard](#) [pg.87] - a series of screens which guide you through the setup process one step at a time. The [new archiving policy wizard](#) can be accessed from the [console tree](#) [pg.35], from the [console toolbar](#) [pg.34] and from the [actions pane](#) [pg.36]:

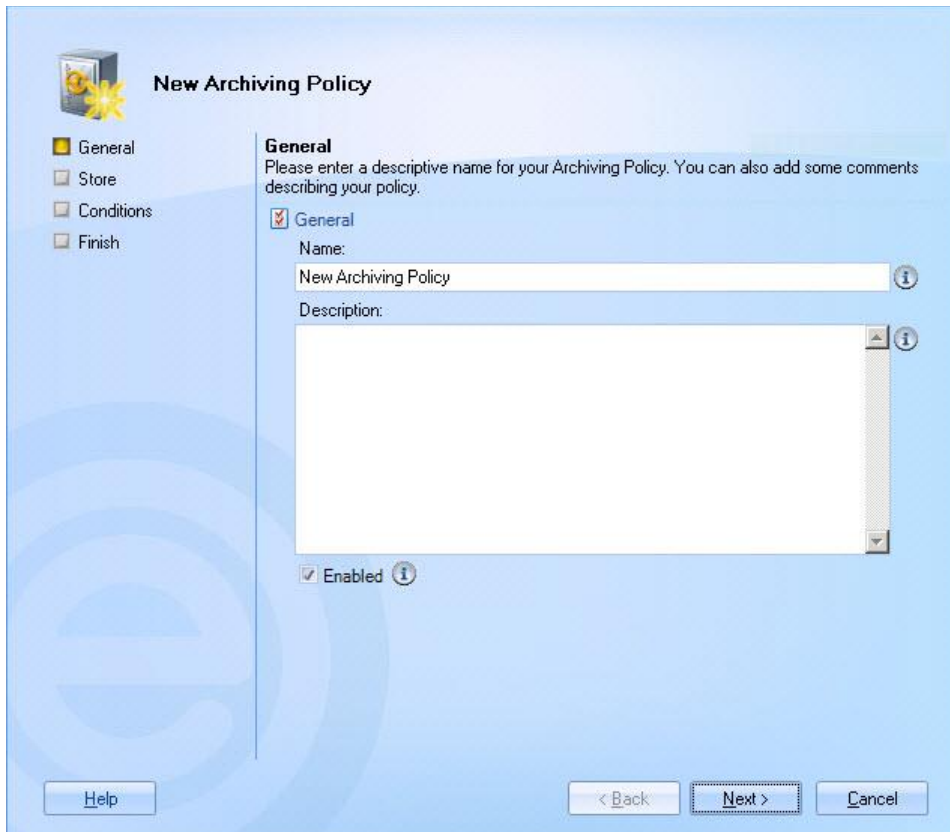


When the [new](#) option is selected, the [new archiving policy wizard](#) [pg.87] is launched so you can step through the process of creating a new [policy](#) quickly and easily.

The New Archiving Policy Wizard

To add a new [archiving policy](#), follow the steps below:

1. Select the [archiving policies](#) branch of the console tree. All existing [policies](#) are displayed in the [policies \[pg.61\]](#) tab.
2. Select the [new](#) option from the toolbar to launch the [new archiving policy wizard](#) at the [general](#) settings page:



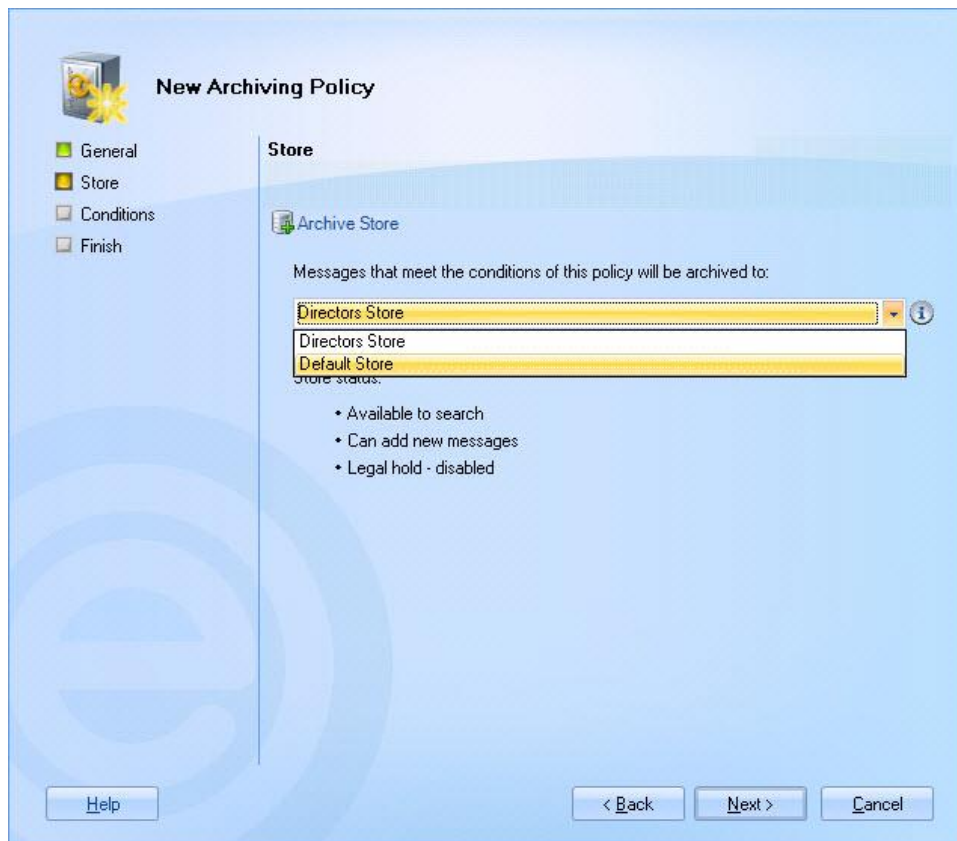
The screenshot shows the 'New Archiving Policy' wizard with the 'General' tab selected. On the left, a sidebar contains icons for 'General' (selected), 'Store', 'Conditions', and 'Finish'. The main area has a title 'New Archiving Policy' and a sub-header 'General'. Below this, it says 'Please enter a descriptive name for your Archiving Policy. You can also add some comments describing your policy.' There is a checkbox for 'General' which is checked. Below that is a 'Name:' label followed by a text box containing 'New Archiving Policy'. Then a 'Description:' label followed by a large text area. At the bottom, there is a checkbox for 'Enabled' which is checked. At the bottom of the wizard are three buttons: '< Back', 'Next >', and 'Cancel'. A 'Help' button is also present in the bottom left corner.

Enter a meaningful name and description for the policy. For further information about this tab see [anatomy of a policy - general \[pg.66\]](#).

NOTE

The **new policy** option is also available using the right-click menu or from the **actions** pane.

3. Click [next](#) to access [store](#) options:



Exclaimer Mail Archiver archives messages to a [store](#). A [default store](#) is automatically configured when [Exclaimer Mail Archiver](#) is installed but, if required, additional [stores](#) can be added using the [storage \[pg.110\]](#) branch of the [console tree \[pg.31\]](#).

In many cases, simply archiving all messages to the [default store](#) will suffice. However, some organizations may have more complex requirements, with different archive [stores](#) for different organizational entities. For example, an organization requiring one archive store for each company; or perhaps different archive stores for different departments. Any existing stores are available for selection using the drop-down list.

4. Select the required archive [store](#) and click next to access policy [conditions](#):

New Archiving Policy

General
Store
Conditions
Finish

Conditions
Please use the list of options below to define the Messages that you would like to include in this Archiving Policy.

Select condition(s)

- ☐ All Messages
- ☐ The Sender is someone
- ☐ The Recipient is someone
- ☐ The Subject contains specific words or phrases
- ☐ The Body contains specific words or phrases
- ☐ One or more message headers contains specific words or character sequences
- ☐ The Message is a Meeting Request, Update or Response
- ☐ The Message is a Task Request or Update
- ☐ No previous policy of this type has been applied

Edit a condition by clicking an underlined value

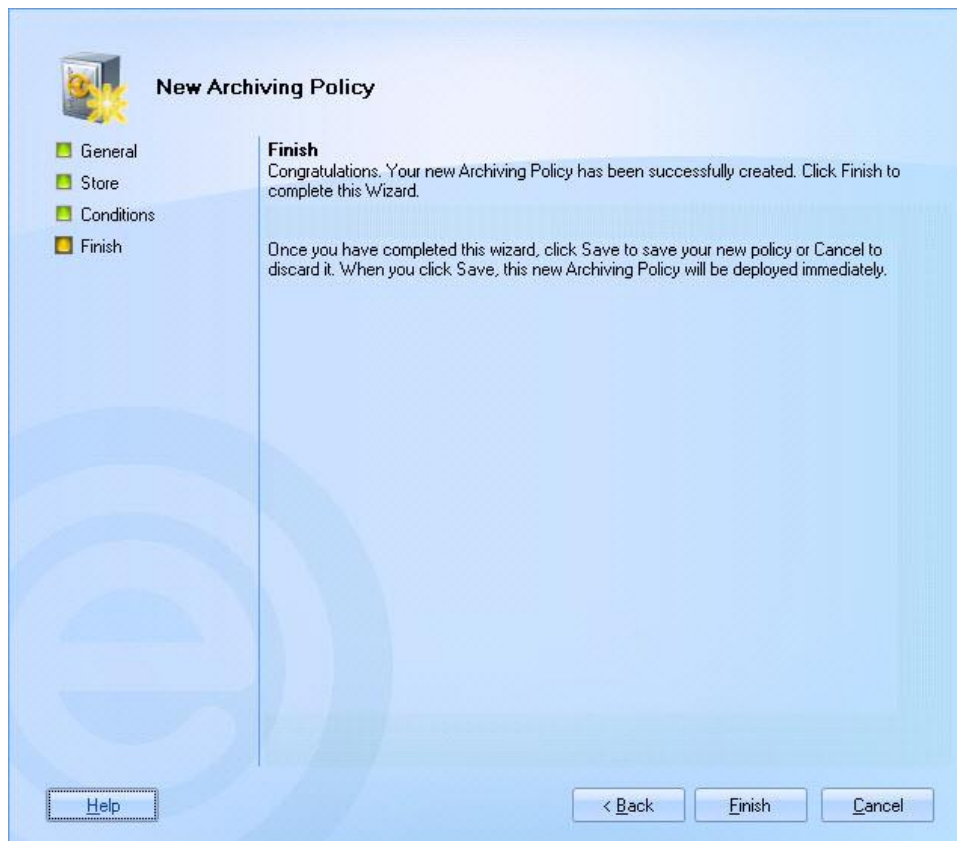
Policy applies to messages where:

☐ Apply policy when all conditions are met
☒ Apply policy when any condition is met

[Help](#) [< Back](#) [Next >](#) [Cancel](#)

Conditions are used to set [criteria](#) [pg.70] to determine the circumstances under which the policy is applied. Having created the policy, you can update the [conditions](#) [pg.68] at any time and also add [exceptions](#) [pg.76], [date range](#) [pg.81] and [next policy](#) [pg.84] criteria.

5. Set required [conditions](#) (remember that you can always refine these settings later if necessary) and click [next](#) to confirm your selections and access the final page of the wizard:



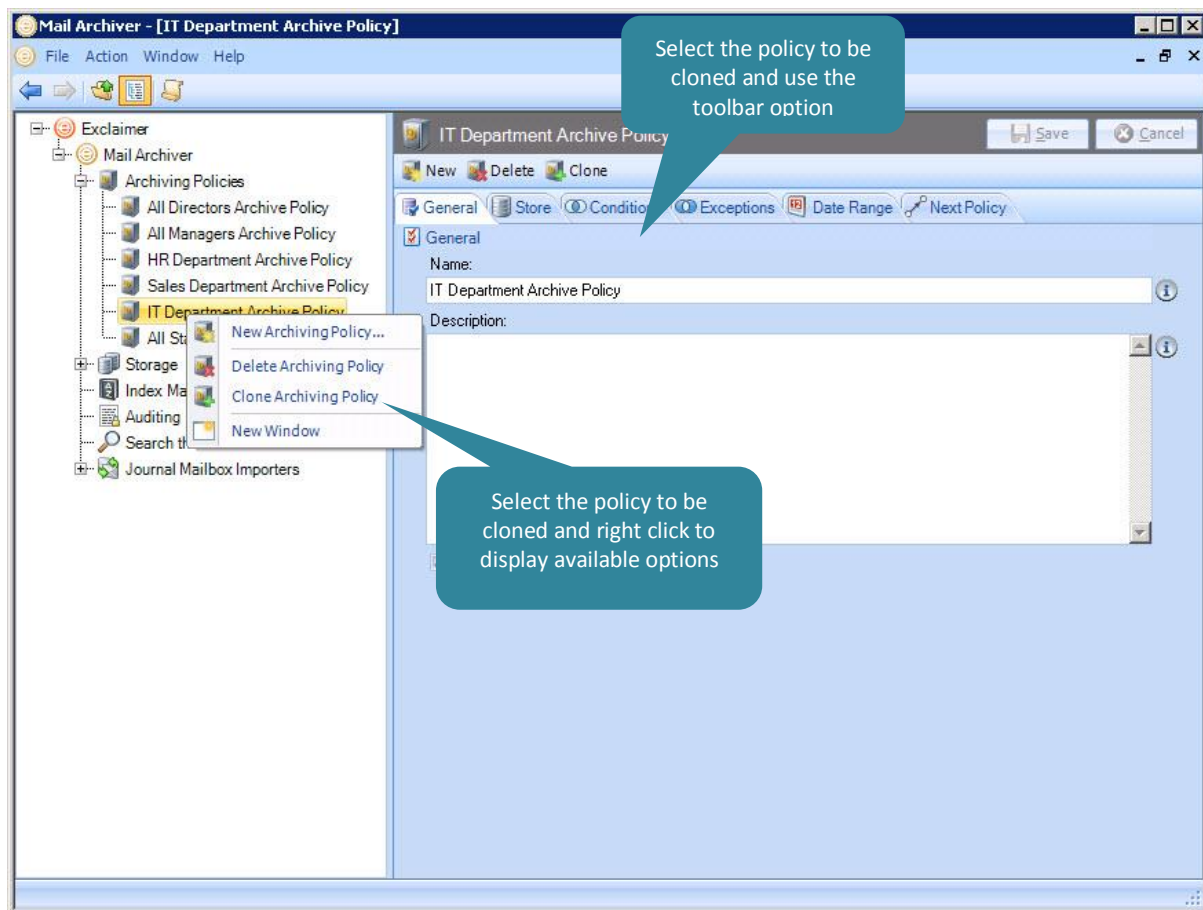
6. Click [finish](#) to complete the process and add the new policy to the [policies list](#) [pg.58].

NOTE

You must click the **save** button at the top of the Exclaimer console to [save changes](#) [pg.40] in Exclaimer Mail Archiver. If you do not save changes (or if you use the **cancel** button) the new policy will not be retained when you exit from Exclaimer Mail Archiver.

Cloning a Policy

If you need to create a new [policy](#) which has similar settings to an existing [policy](#), it is quicker to take a copy of the existing [policy](#) and then update required settings for that copy (as opposed to [creating a new policy from first principles](#) [pg.86]). The [clone](#) option is used to create a copy of an existing [policy](#) for this purpose, and is available from the console toolbar, or the right-click menu:



To clone an existing [policy](#), select the [policy](#) to be copied from the console tree, then either click the [clone](#) button from the toolbar or right click and select [clone](#) from the context menu. A copy of the selected [policy](#) is added to the console tree, ready to be updated - from here you can change the name, description and any other required settings.

Having updated the cloned [policy](#), click [save](#) to save changes.

Changing a Policy

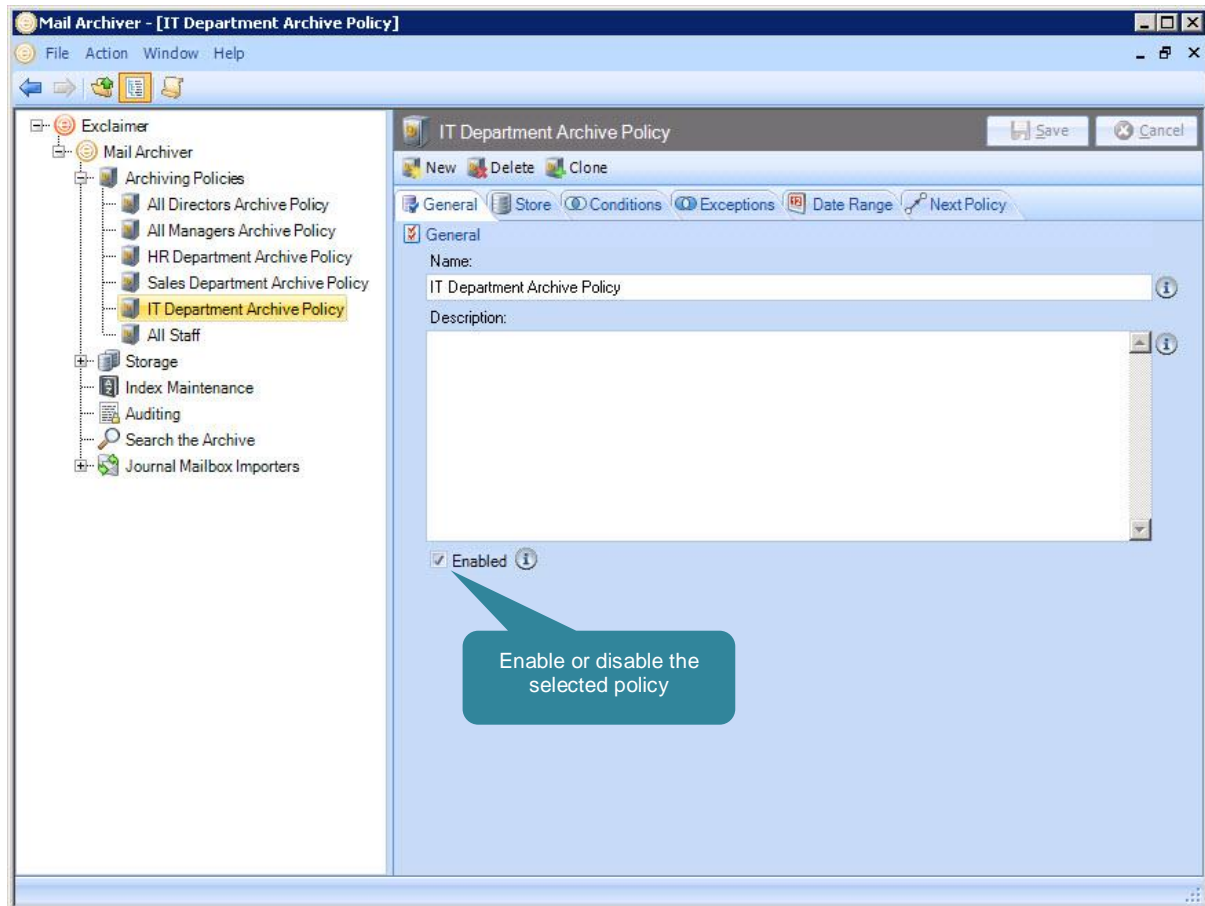
If you are changing key aspects of a [policy](#) - for example, [conditions](#) [pg.68], [exceptions](#) [pg.76] or the [destination store](#) [pg.67] - it is advisable to [disable journal mailbox importing](#) [pg.46] until policy changes are complete.

To update an existing [policy](#), simply select the [policy](#) (either from the [console tree](#) [pg.35] or the [policy list](#) [pg.58]) and update settings on [selection tabs](#) [pg.35] as required.

When a [policy](#) has been changed but not saved, the [archiving policies](#) branch (and the associated child branch for the updated [policy](#)) is displayed with an asterisk (*) symbol. When the updated [policy](#) is selected, you can see which tabs contain unsaved changes by looking for an asterisk to the right of the tab name. When you are satisfied that all required changes have been made correctly, click [save](#) to save the new settings. All asterisk symbols are cleared once changes have been saved.

Enabling and Disabling a Policy

A policy must be enabled in order for it to be processed. When a [new policy is added](#), [pg.86] it is enabled by default; however there may be times where you need to change this setting. To quickly enable or disable a policy, select the required policy (either from the console tree or the policy list):



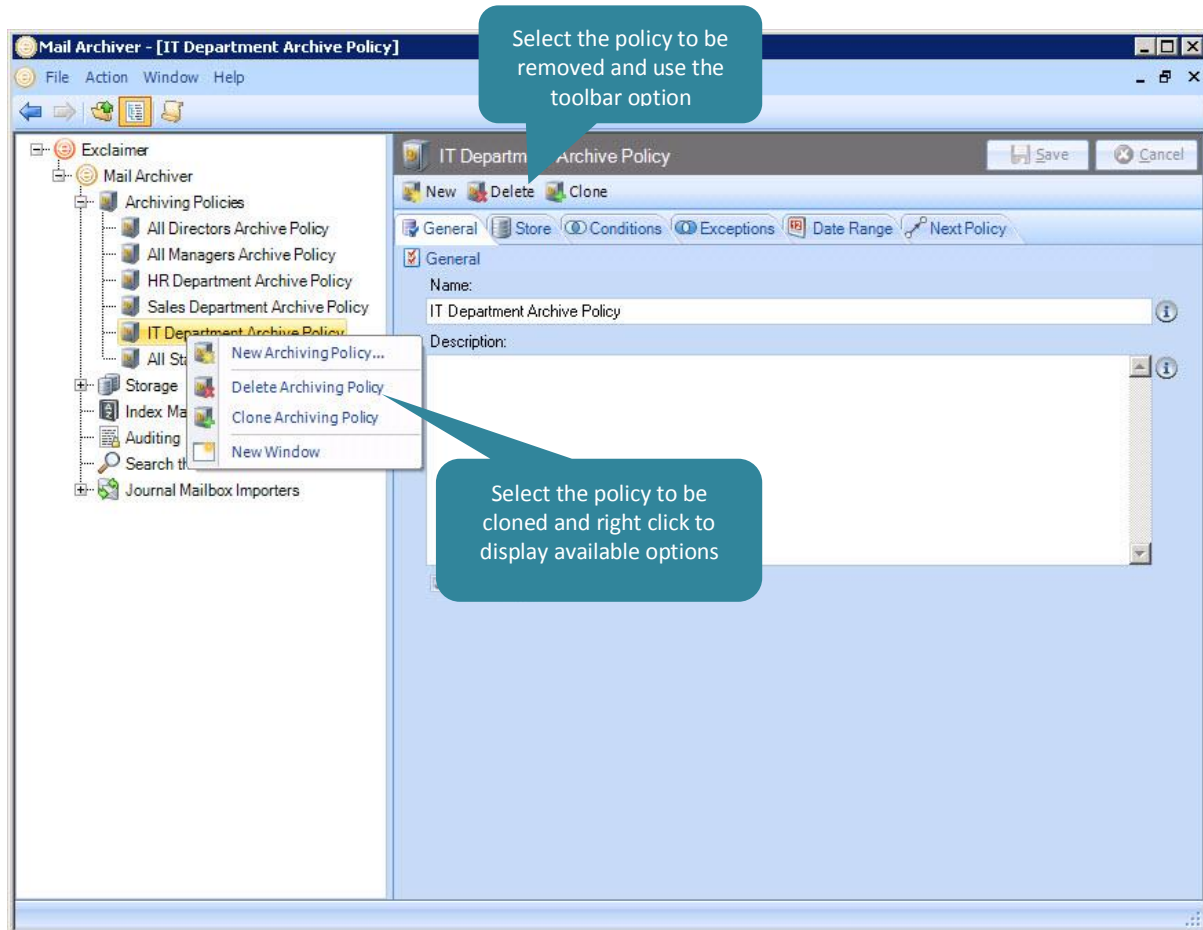
Ensure that the [enabled](#) check box is selected to enable the [policy](#), or de-selected to disable the [policy](#). Click [save](#) to save changes.

NOTE

If you do not save changes, any enable/disable changes will not be applied.

Removing a Policy

To remove an existing **policy**, select the **policy** (either from the [console tree \[pg.35\]](#) or the [policy list \[pg.58\]](#)). Then, either right click and select **delete** from the context menu, or click the **delete** button on the toolbar:



Having chosen to delete a **policy**, you are asked **are you sure you want to delete this policy?** Click **yes** to confirm the deletion or **no** to abandon the task. Finally, click **save** to save changes.

NOTE

A **policy** is not permanently deleted until settings have been saved. If you exit without saving (or if you **cancel** changes), the **policy** will be reinstated in the console tree.

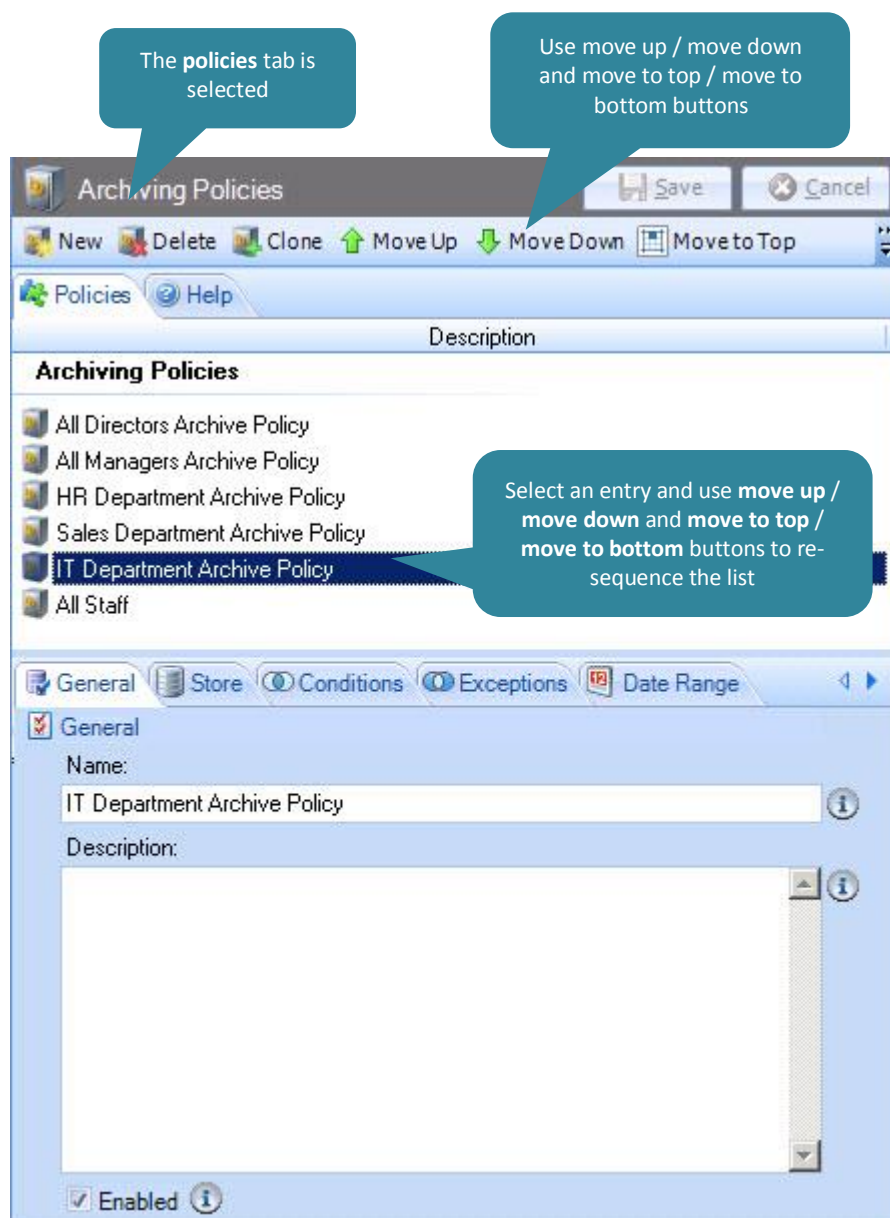
How To - Policies

This section contains instructions for completing a selection of common tasks with [policies](#) using Exclaimer Mail Archiver, including:

- [How do I change the sequence in which policies run?](#) [pg.96]
- [How do I create a policy based upon specific Active Directory attributes?](#) [pg.100]
- [How do I define a policy based on a subject line trigger word?](#) [pg.97]
- [How do I create a policy for all internal or all external emails](#) [pg.104]
- [How do I define a policy based upon email address?](#) [pg.107]

How Do I Change the Sequence in Which Policies Run?

Policies are processed in the order that they are listed in the [policies tab](#) [pg.61] (this sequence is also reflected in the [console tree](#) [pg.35]). To change the sequence in which policies are listed, access the [policies tab](#) and use [move up](#) / [move down](#) and [move to top](#) / [move to bottom](#) buttons as required:



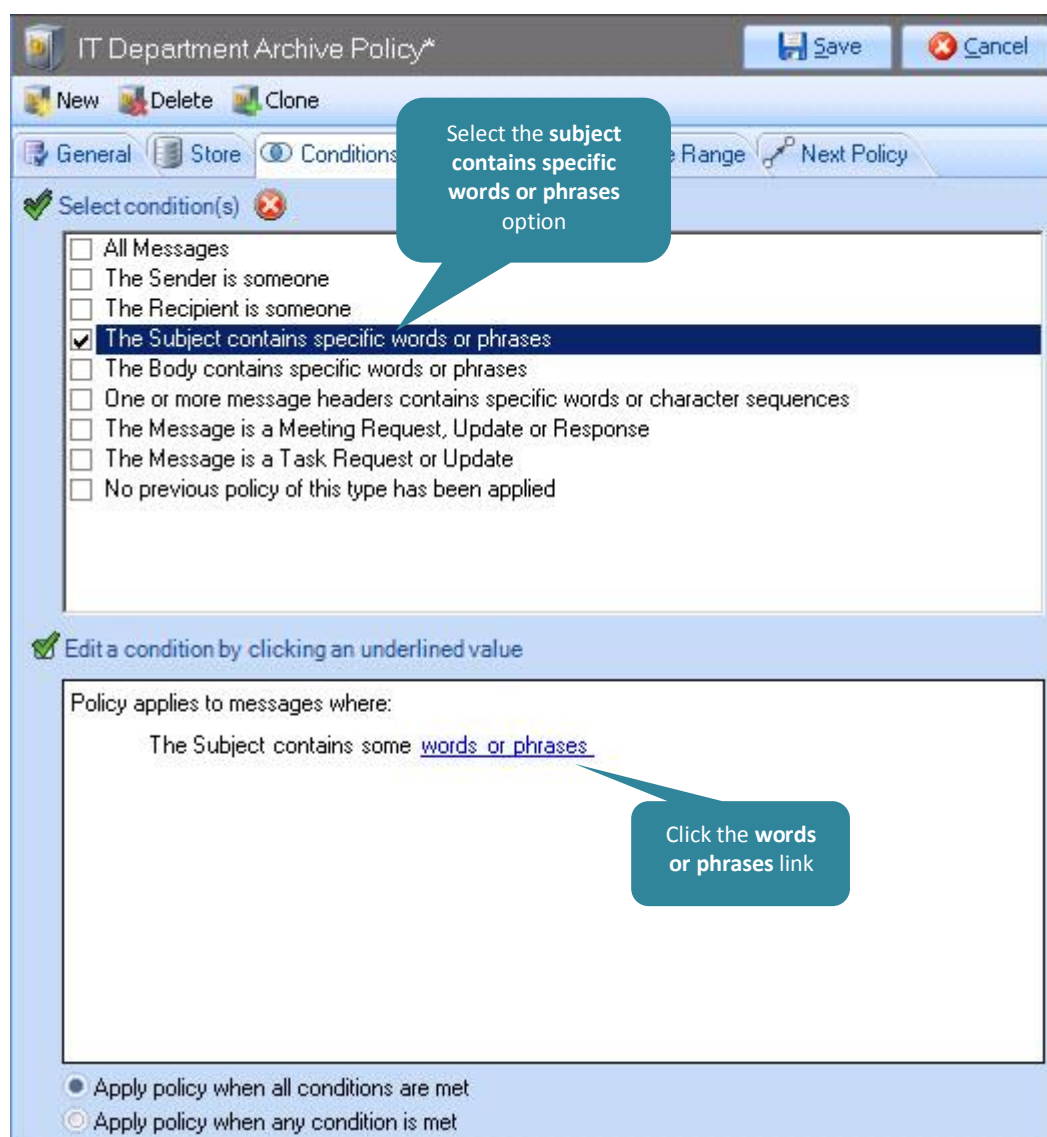
The [move up](#) / [move down](#) buttons moves the selected up/down by one entry. The [move to top](#) / [move to bottom](#) buttons move the selected policy to the very top or the very bottom of the list.

How Do I Define a Policy Based Upon a Subject Line Trigger Word?

It is sometimes useful to apply a [policy](#) based upon a 'trigger word' in the subject line of emails. For example, you might wish to create a [policy](#) to archive email messages with the word 'confidential' in the subject line to a specific archive store.

To achieve this, you should define a [policy](#) where the [conditions](#) [pg.68] are set for [subject contains specific words or phrases](#), as shown below:

- Select the [subject contains specific words or phrases](#) option:



- Add required words and phrases. Enter as many words and phrases as required, using the [add](#) button to confirm each one. If you specify multiple words in a single line, they are treated as a phrase:

Words or phrases

confidential|

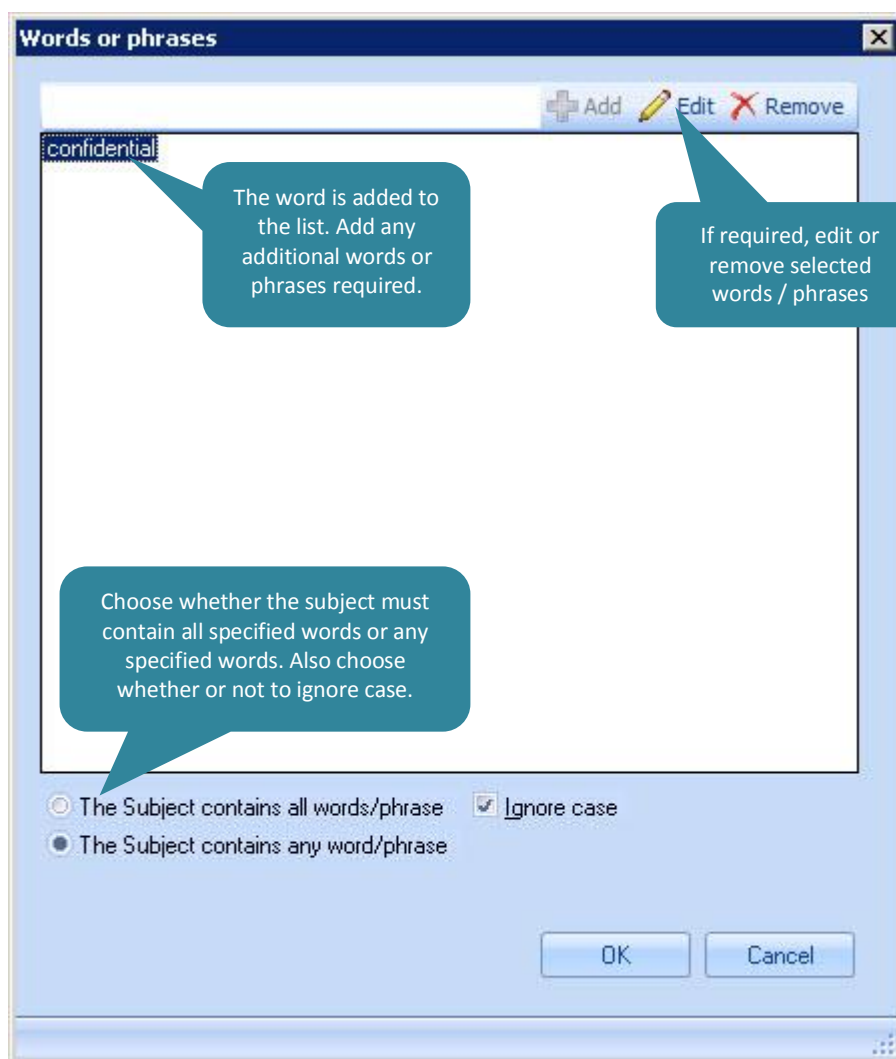
+ Add Edit X Remove

☒ The Subject contains all words/phrase ☒ Ignore case

☐ The Subject contains any word/phrase

OK Cancel

- Set options for words and phrases. Choose whether all or any words / phrases must be present to trigger the policy. Also choose whether or not to ignore case:

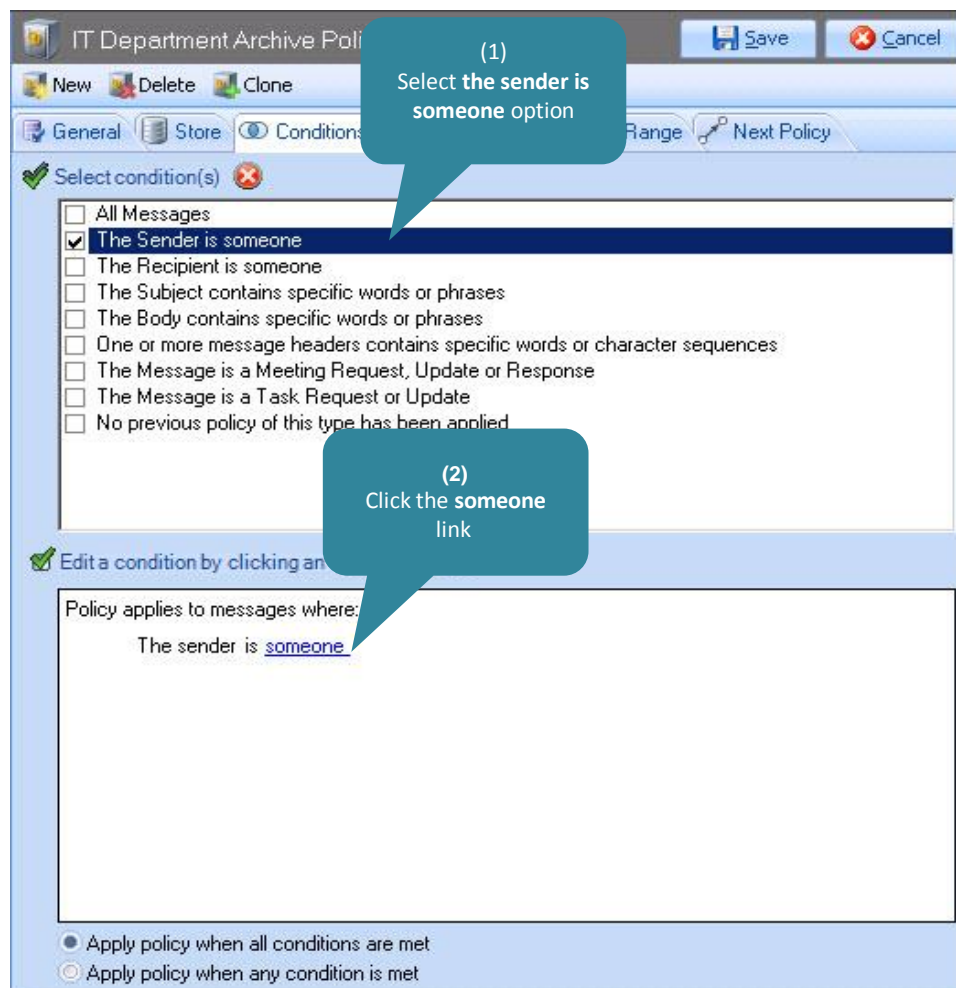


How Do I Define a Policy Based Upon Specific Active Directory Attributes?

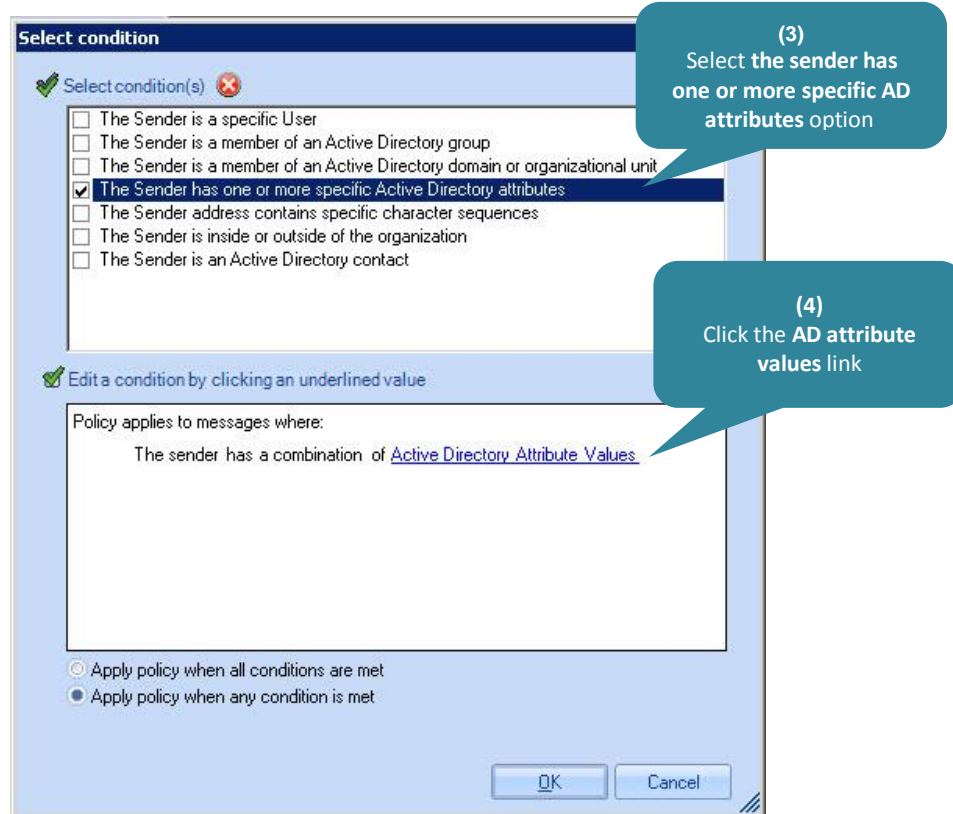
The [configure attributes window](#) [pg.74] allows you to define [conditions](#) [pg.68] and [exceptions](#) [pg.76] based upon queries that are run on Active Directory user attributes.

The following example shows how to set a [policy condition](#) which uses an Active Directory attribute query. In this scenario, a [policy](#) is required to apply a [policy](#) for everyone within the 'IT' department of an organization.

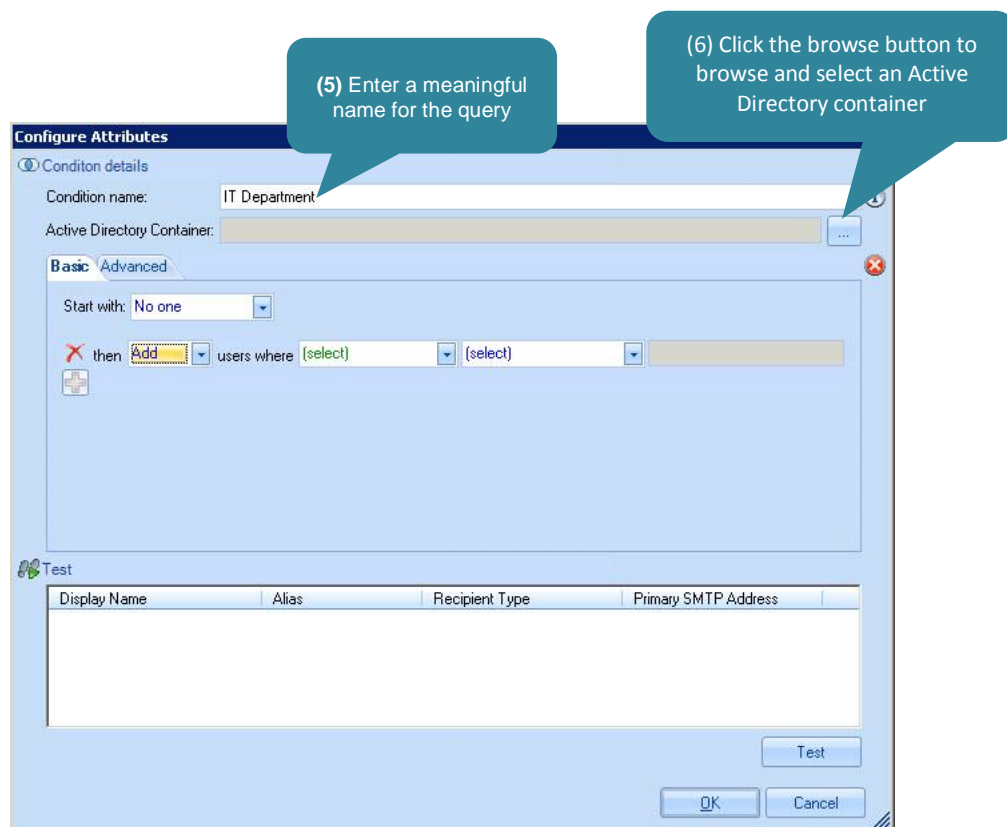
- Define the [sender is someone](#) condition:



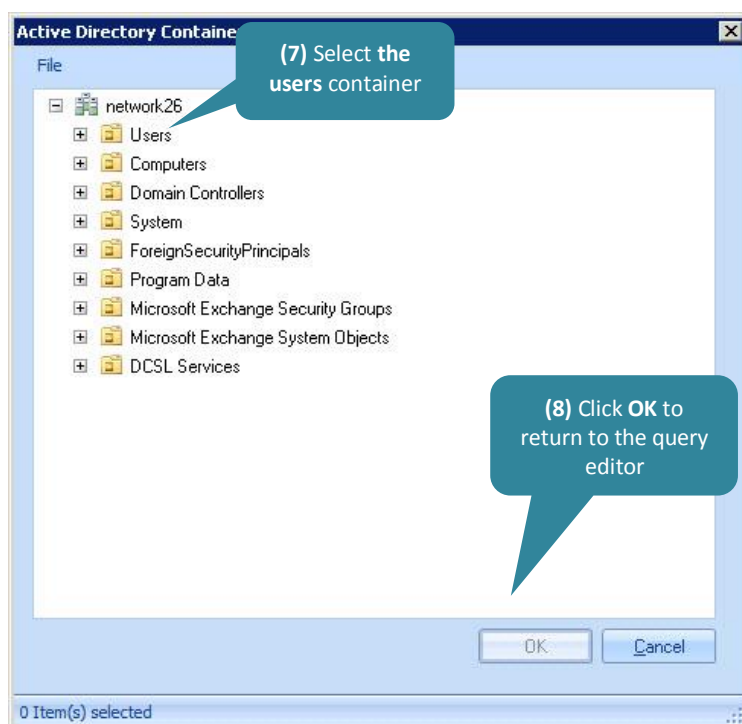
- Define the sender has one or more specific AD attributes condition:



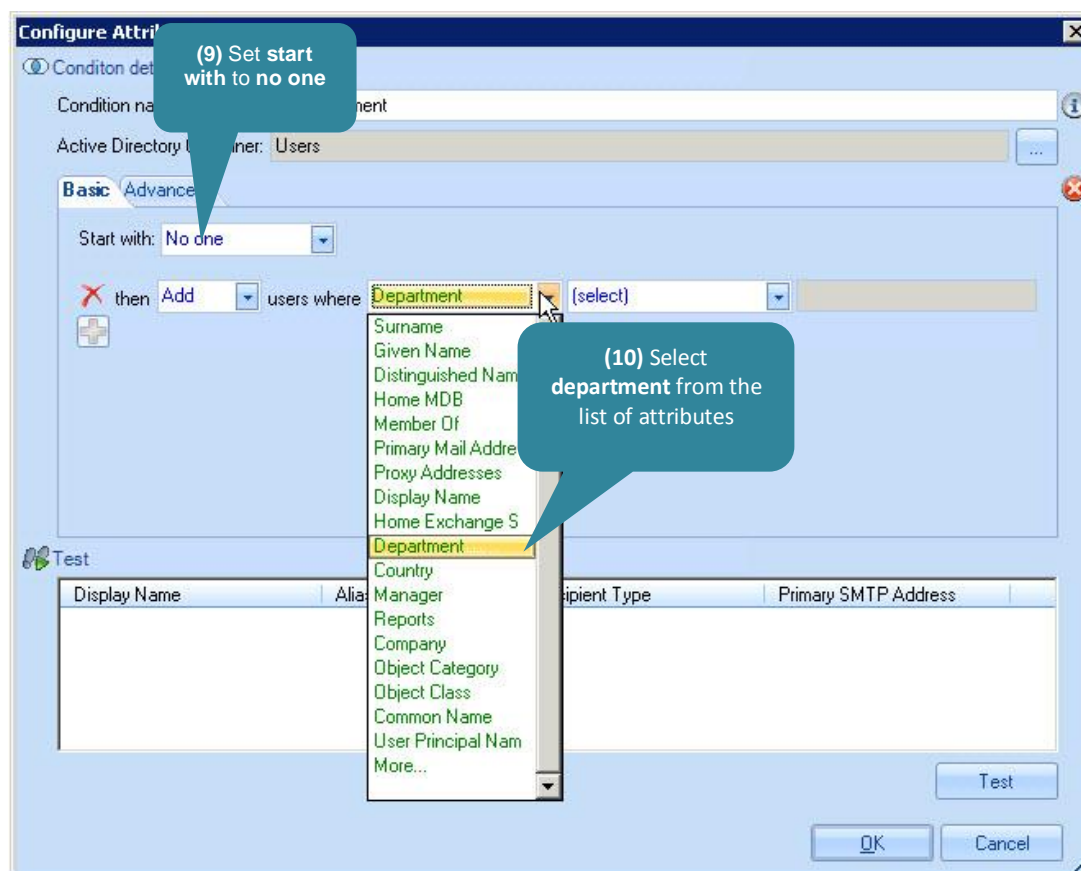
- Enter basic details for the query:



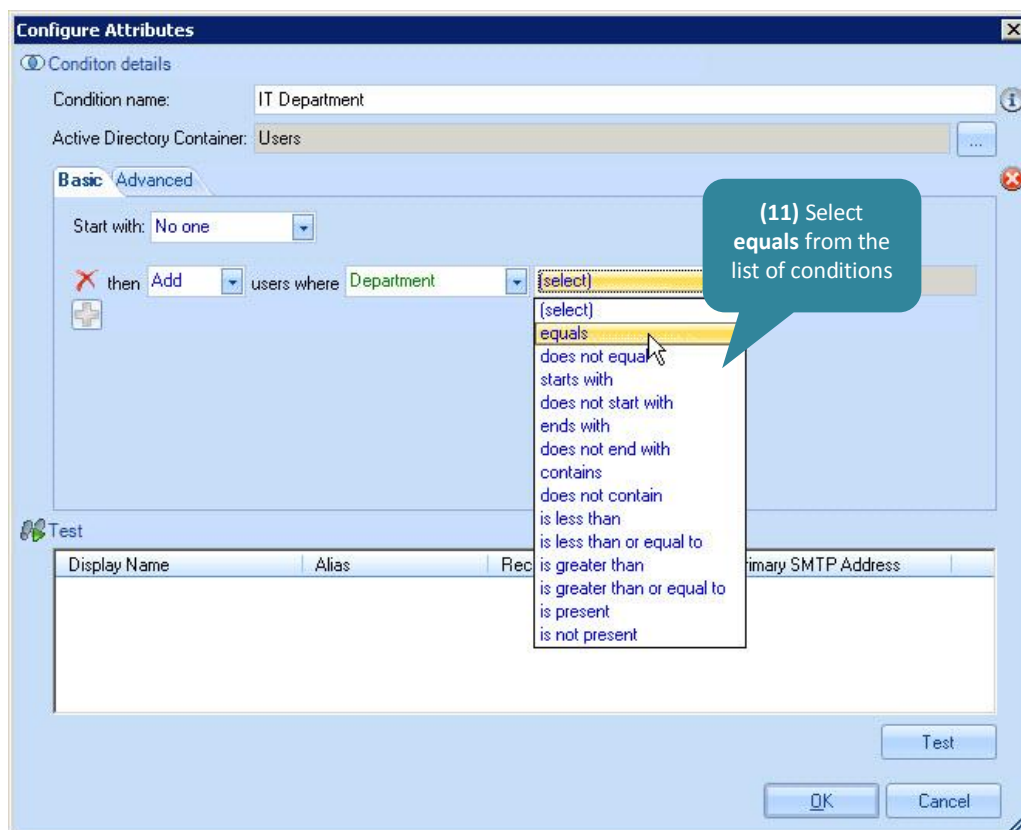
- Browse and select an Active Directory container:



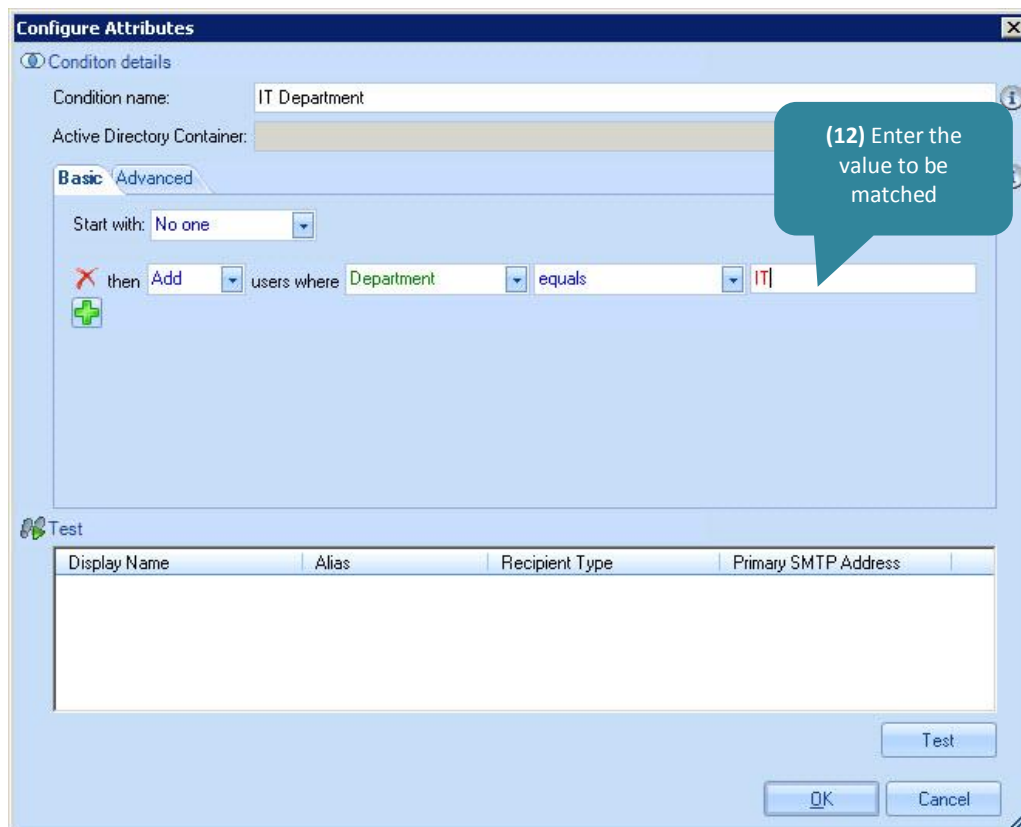
- Choose a start point and select required attribute:



- Choose how matching should be made:



- Enter the required attribute value for matching:

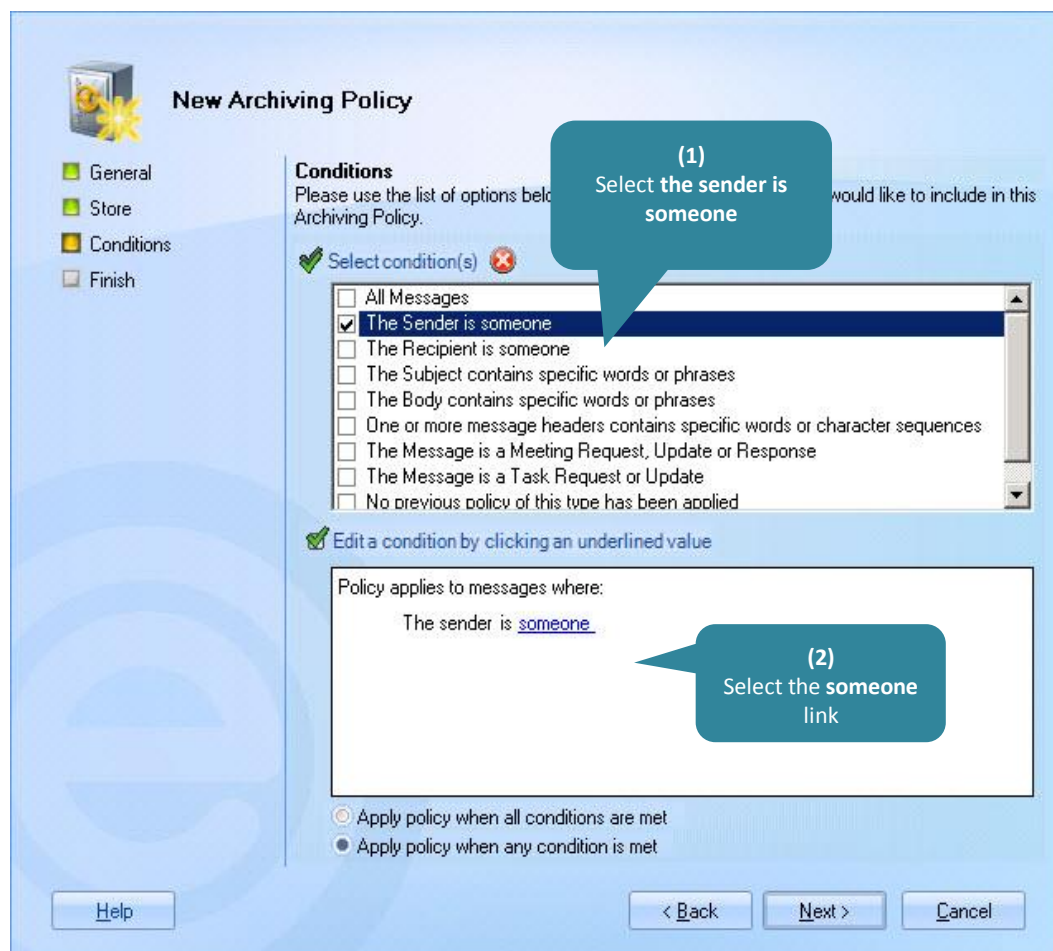


How do I Define a Policy for All Internal or All External Emails?

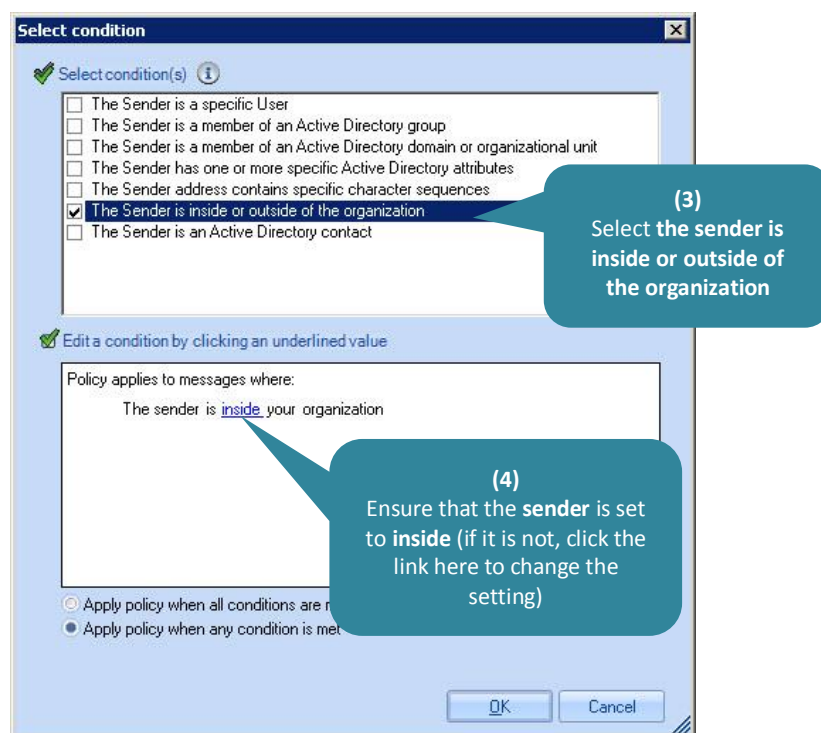
In some cases, you may wish to archive internal and external email messages separately. One way to do this is to define a [policy](#) for only internal emails and another [policy](#) for only external emails, with a different [store](#) [pg.67] specified in each case. Alternatively, you might incorporate this as an [exception](#) [pg.76] - for example - archive email messages except where the recipient is outside of the organization (and define a separate [policy](#) to manage the exceptions).

The following example shows how to use a [condition](#) [pg.68] to handle internal/external emails.

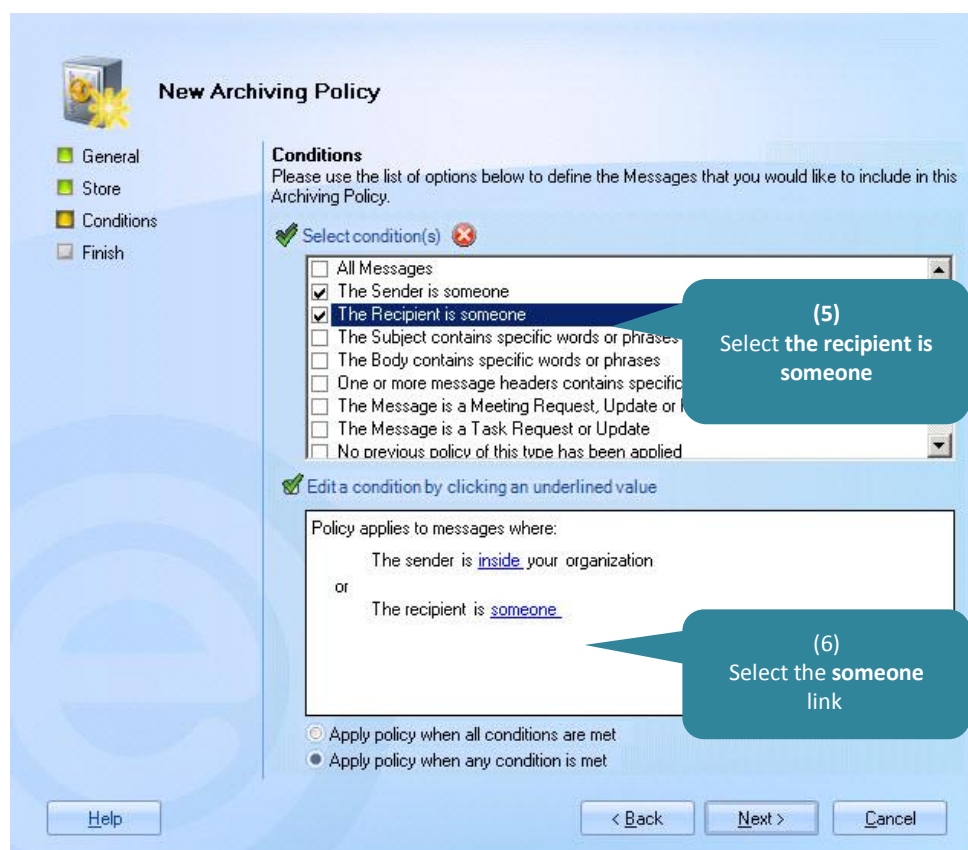
- Access policy conditions and select [the sender is someone](#) option:



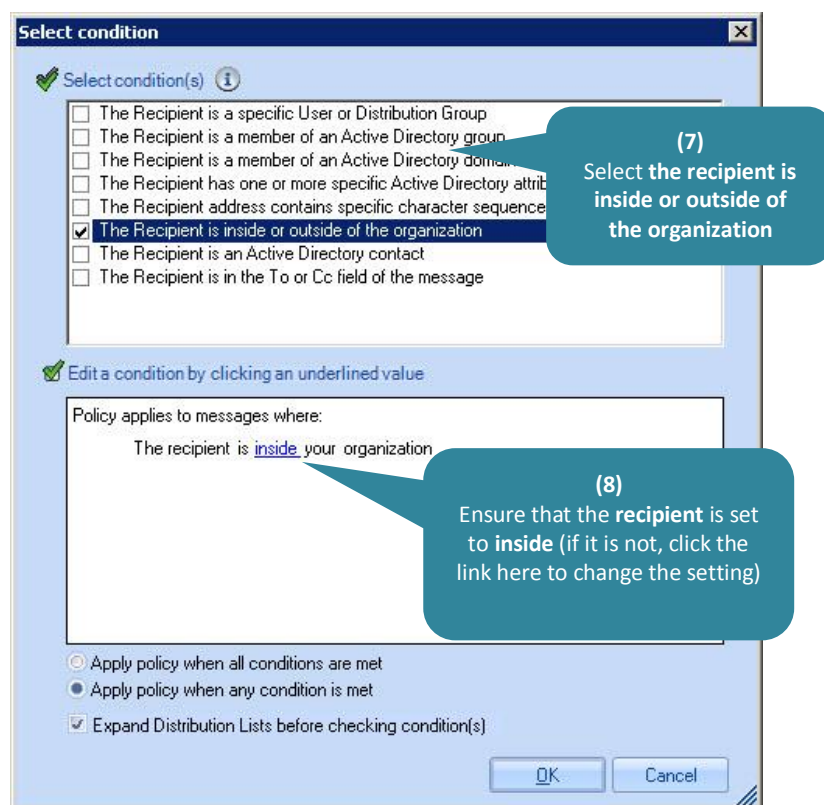
- Click the [someone](#) link in the lower pane for further options:



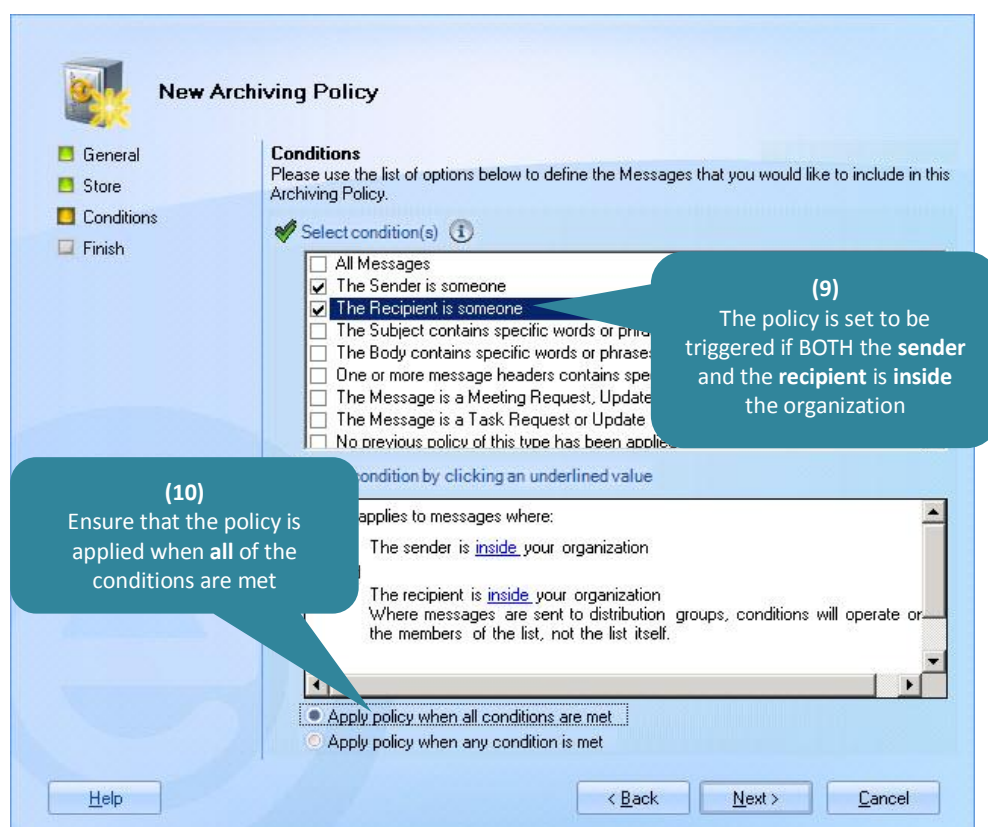
- Ensure that the setting is [inside](#) the organization (this is the default setting but, if required, click the hyperlink to access [inside](#) / [outside](#) options). Click [OK](#) to exit back to the [conditions](#) tab.
- Select the [recipient is someone](#) option:



- Click the [someone](#) link in the lower pane for further options:



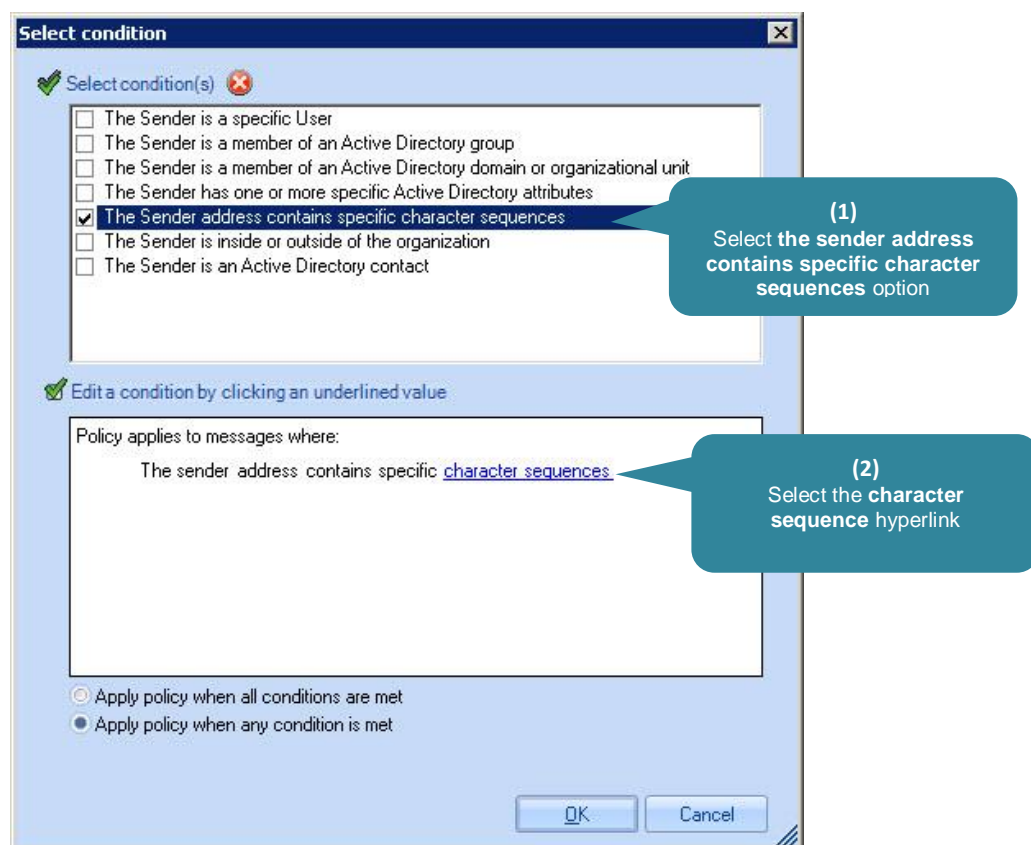
- Ensure that the setting is [inside](#) the organization (this is the default setting but, if required, click the hyperlink to access [inside](#) / [outside](#) options). Click [OK](#) to exit back to the [conditions](#) tab where both conditions are defined:



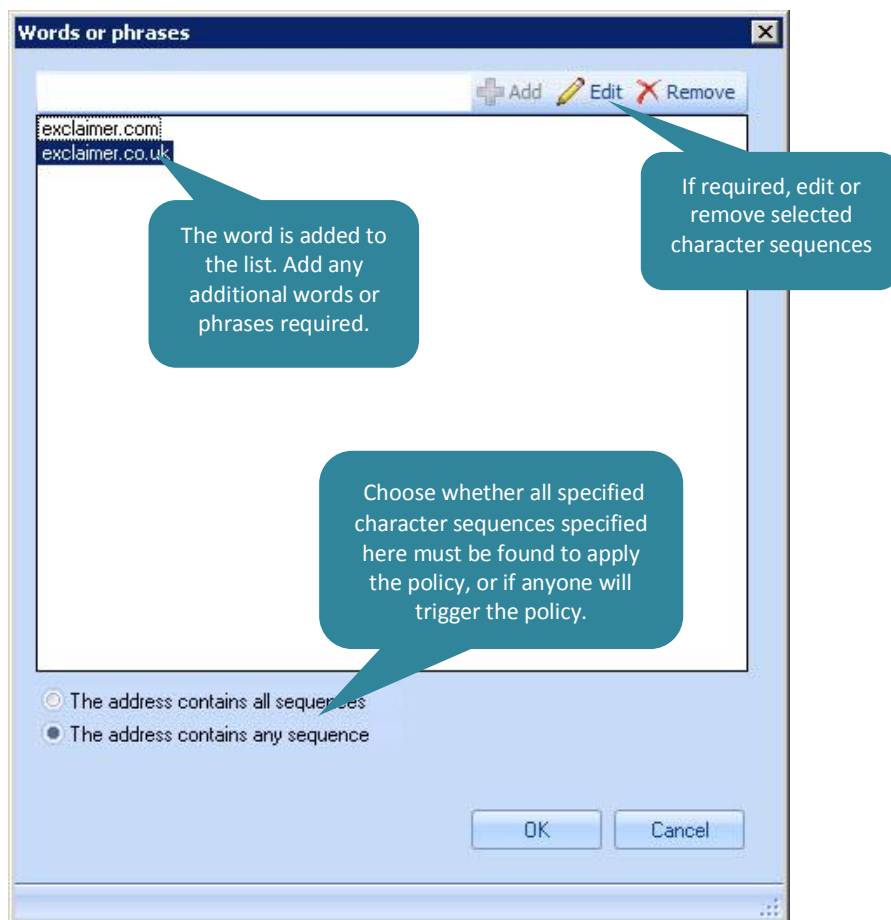
How Do I Define a Policy Based Upon Email Address?

If required, a [policy](#) can be defined to handle messages based upon the sender and/or recipient email address (or part of the address). To do this, a [condition](#) [pg.68] would be defined for the sender or the recipient. The following example shows the required condition for a sender's email address.

- Access policy conditions and select the [sender is someone](#) option:



- Click the [character sequence](#) link in the lower pane for further options. Having selected this option, the words or phrases window is displayed. Here, you can enter as many character sequences as required, using the [add](#) button to confirm each one:



Chapter 6

Storage

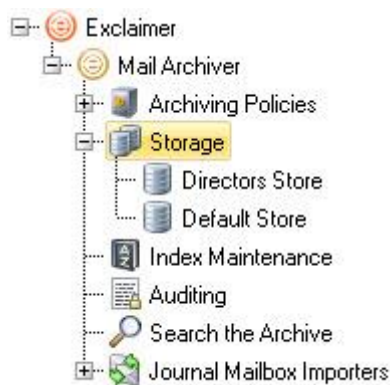
Introduction

Exclaimer Mail Archiver archives messages to a [data store](#), where messages are indexed in an efficient structure for fast, powerful searching and easy management of archived messages.

A [default store](#) is automatically configured when Exclaimer Mail Archiver is installed. If required, additional stores can be added using the [storage](#) branch of the console tree. In most cases, simply archiving all messages to the [default store](#) will suffice however some organisations may have more complex requirements, with different archive [stores](#) for different organisational entities.

For example, an organization may be comprised of a number of separate companies require one archive [store](#) for each company; or an organization may prefer different archive [stores](#) for different departments. Alternatively, you may wish to configure a 'near-line' [store](#) for archiving email that is frequently accessed and a 'far-line' [store](#) for messages that are unlikely to be accessed very often. Each [store](#) is associated with its own [data settings](#) [pg.116], [availability settings](#) [pg.119] and [security permissions](#) [pg.121], so you can determine which users can access (i.e. [search](#) [pg.177]) each [store](#) and what level of access they have.

All work with [stores](#) is completed from the [storage](#) branch of the console tree:



From here, [stores](#) can be [viewed](#) [pg.112], [added](#) [pg.126], [updated](#) [pg.130], [removed](#) [pg.133] and [restored](#) [pg.134].

Once a [store](#) has been configured, it is available for use when defining [archiving policies](#) [pg.61]. [Archiving policies](#) are used to define a set of rules which determine if and then where email messages (both sent and received) are archived. Every [policy](#) is associated with a [store](#), so you can specify where email messages (which meet given criteria for that [policy](#)) will be archived.

This section contains information for working with [stores](#), including:

- [Adding a new store](#) [pg.126]
- [Updating an existing store](#) [pg.130]
- [Moving an existing store](#) [pg.131]
- [Removing an existing store](#) [pg.133]
- [Restoring a previously deleted store](#) [pg.134]

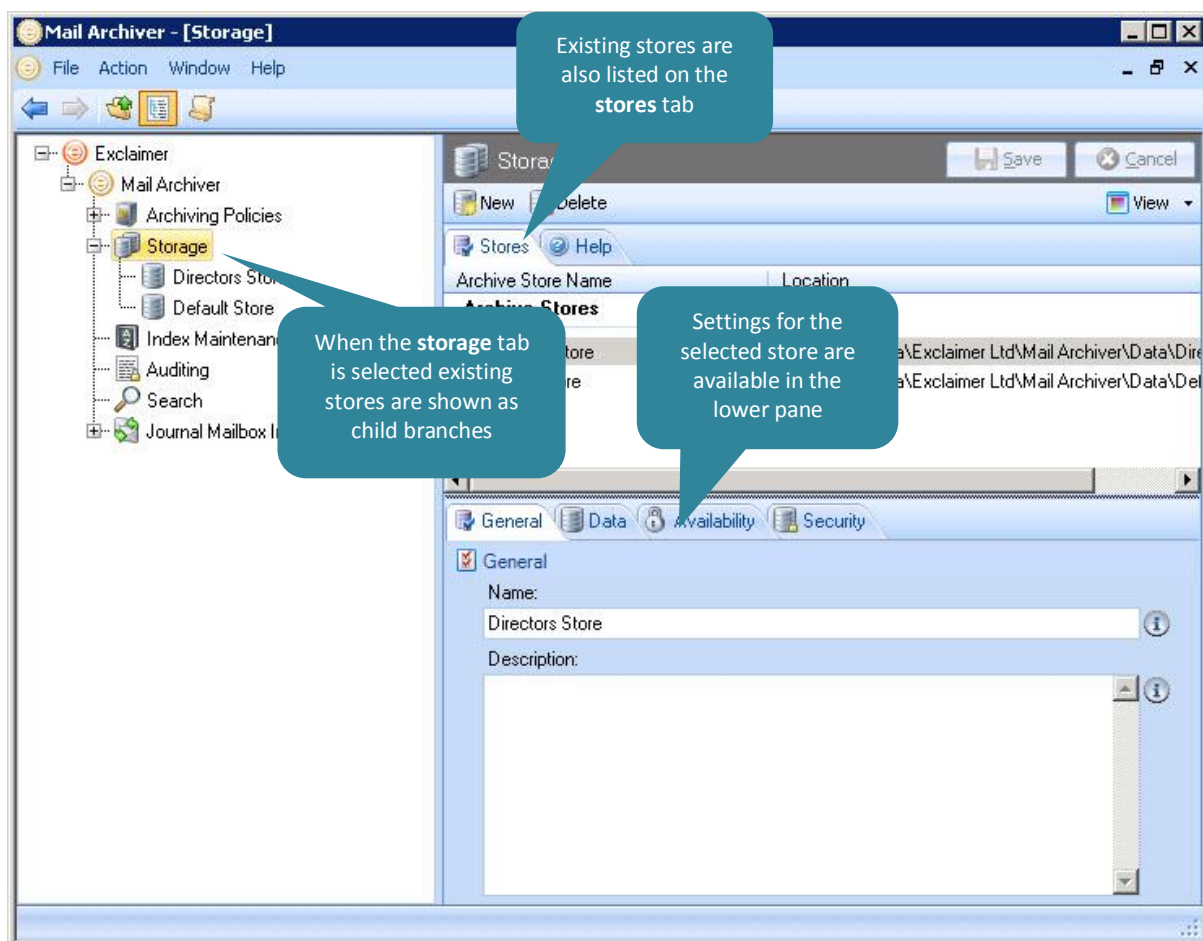
If required, you can also learn more about importing legacy emails into a store using the [batch importer wizard](#) [pg.135].

Accessing Existing Stores

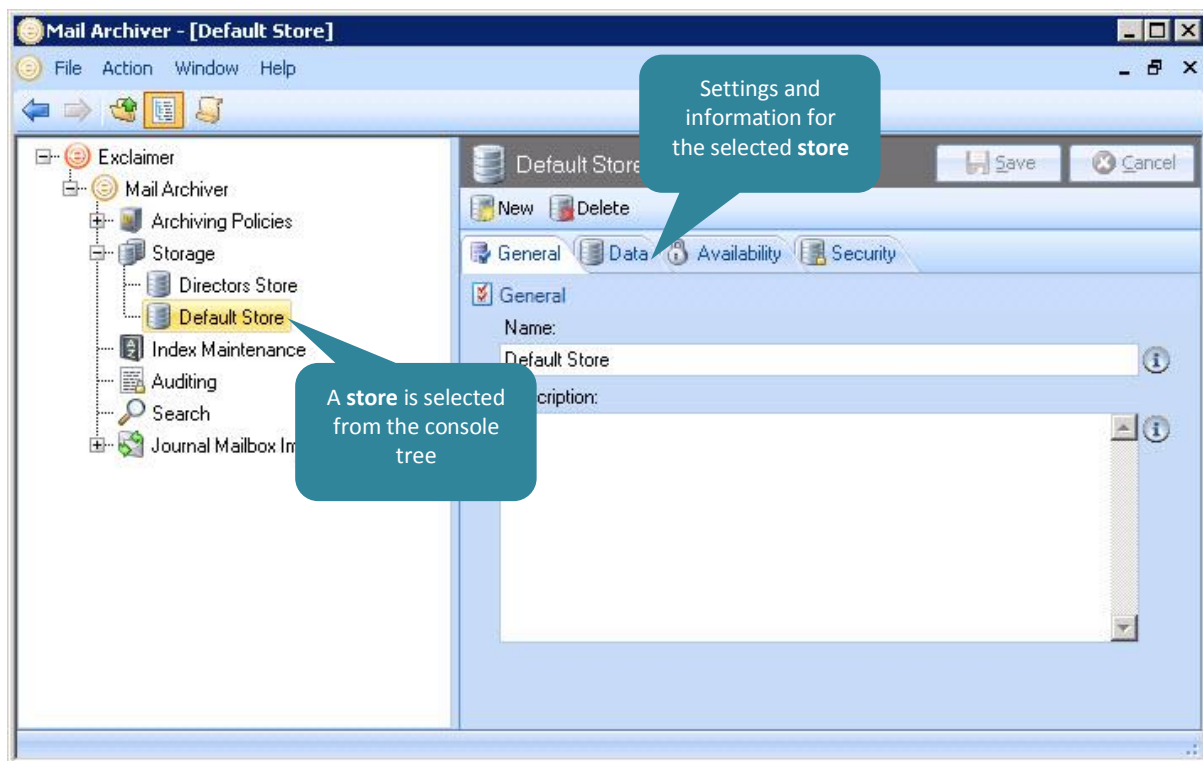
Within **Exclaimer Mail Archiver**, **stores** are accessed via the **storage** branch of the **console tree** [pg.31]:



When the **storage** branch is selected, all existing **stores** are displayed in the **stores** tab:



Alternatively, a [store](#) can be selected directly from the [console tree](#):



The list of [stores](#) can also be accessed by selecting the [manage stores](#) option from the [actions](#) pane.

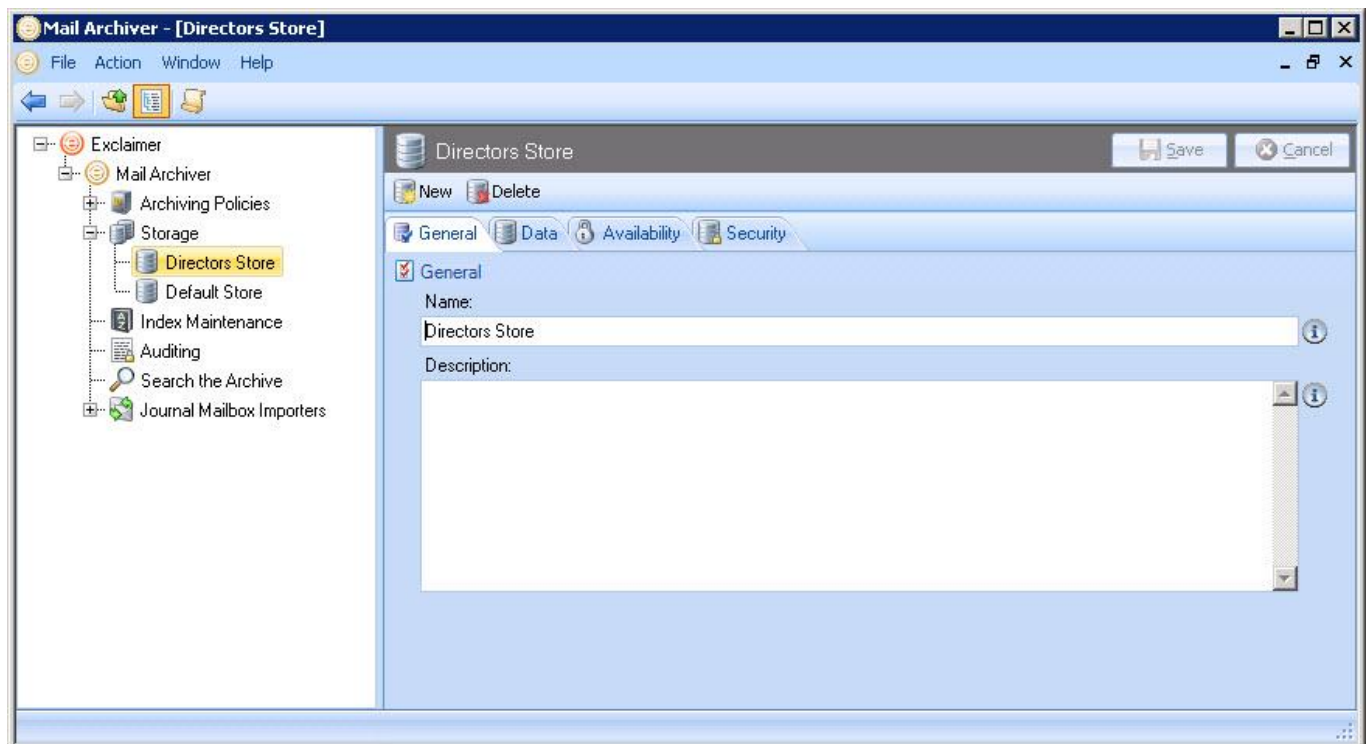
Each [store](#) is associated with its own [data settings](#) [pg.116], [availability settings](#) [pg.119] and [security permissions](#) [pg.121], so you can determine which users can access (i.e. [search](#) [pg.177]) each [store](#) and what level of access they have.

NOTE

Each store is associated with its own search index. For further information please refer to the [indexes](#) section [pg.157].

Storage Settings and Information

Each [store](#) is associated with its own [data settings](#) [pg.116], [availability settings](#) [pg.119] and [security permissions](#) [pg.121], so you can determine which users can access (i.e. [search](#) [pg.177]) each [store](#) and what level of access they have. These options are available when a [store](#) is selected (either from the [console tree](#) [pg.31] or within the [store tab](#) [pg.112]):



From here:

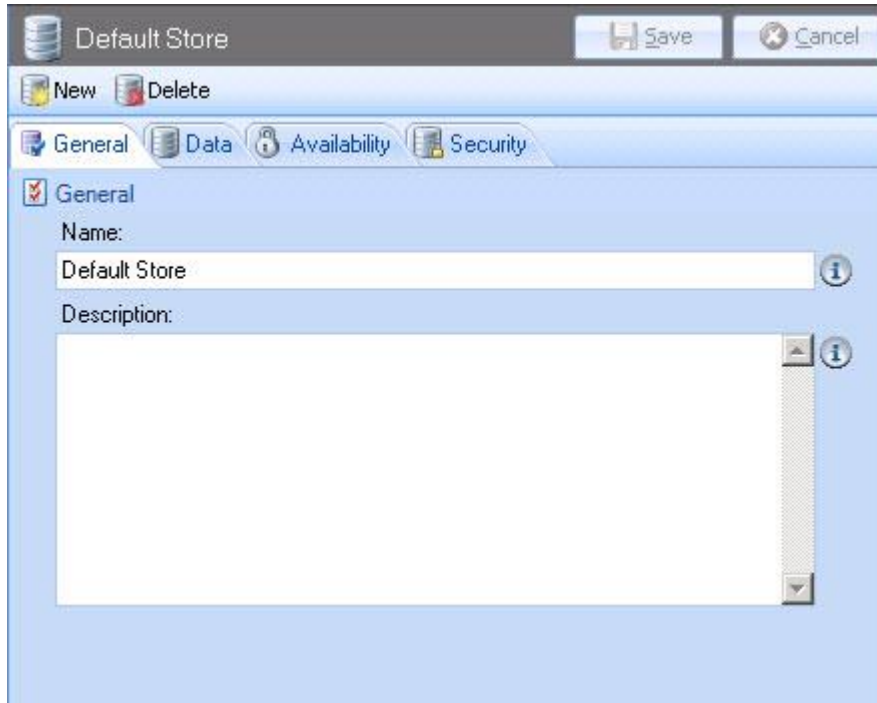
- The [general](#) [pg.115] tab is used to define basic name and descriptive information for the [store](#).
- The [data settings](#) [pg.116] tab is used for key settings such as location and indexing.
- The [availability settings](#) [pg.119] tab is used to control whether or not the [store](#) is available for updates and searching, together with [retention period](#) and [legal hold](#) settings.
- The [security](#) [pg.121] tab is used to determine who can access the [store](#) and associated levels of access.

NOTE

For further information about the Exclaimer console (including the menu, toolbar and actions pane), see [understanding the Exclaimer console window](#) [pg.31].

Storage - General Information

Options on the [general](#) tab are used to define basic information for the [store](#). These settings determine how the [store](#) is displayed throughout the system:

The screenshot shows a window titled 'Default Store' with a 'Save' button and a 'Cancel' button. Below the title bar are 'New' and 'Delete' icons. A tabbed interface shows 'General', 'Data', 'Availability', and 'Security' tabs, with 'General' selected. Under the 'General' tab, there is a 'Name' field with the text 'Default Store' and an information icon. Below it is a 'Description' field, which is a large text area with a vertical scrollbar and an information icon.

Options on this tab are summarized below:

Option	Summary
Name	Each store must have a unique name. The name entered here is displayed in the Exclaimer console tree [pg.31] , and in the stores list [pg.112] .
Description	This field can be used to add any useful information for the store - for example, usage notes, version history, background or explanatory information. The first line of description text is displayed in any stores list [pg.112] (but not the console tree).

NOTE

Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the **save** button to [save changes \[pg.40\]](#) across all tabs. Alternatively, use the **cancel** button to abandon all changes.

Storage – Data Settings

Each store is associated with a **data** tab which contains key settings such as where the store is physically located and when it is indexed:

The screenshot shows the 'Default Store' configuration window with the 'Data' tab selected. The window has a title bar with 'Default Store' and buttons for 'Save' and 'Cancel'. Below the title bar are 'New' and 'Delete' buttons. The 'Data' tab is active, showing settings for 'Store Data' and 'Search Index'.

Store Data

Location: C:\ProgramData\Exclaimer Ltd\Mail Archiver\Data\Wizard Generated Store Change location...

☐ This location requires credentials i

User Name: i

Password: i

Search Index

Location: The Index files are currently located in the same folder as the Store Data Change location...

Update Index:

☒ Every: 30 Minutes i

☐ Daily at: 23:59

☐ Force an update when 500 messages are queued for indexing

Defragment index:

☐ Never

☒ Every: 1 Hours

☐ Daily at: 23:59

Options on this tab are summarized on the following page.

Data settings for [stores](#) are summarized below:

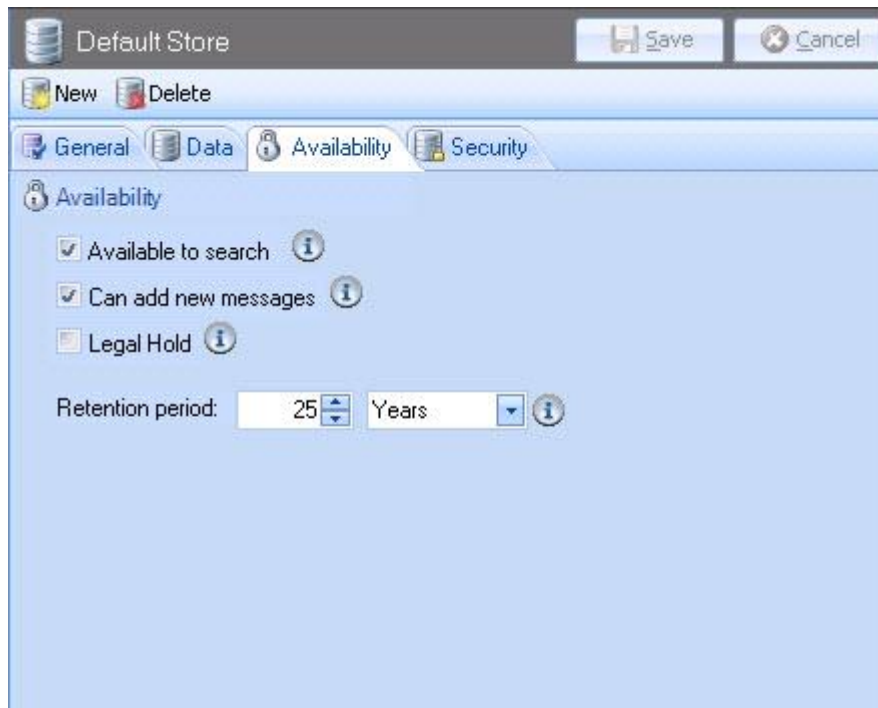
Option	Summary
Store Data > Location	Shows where the store is located, with an associated option to change location [pg.131]. Care should always be taken before moving a store to another location and a number of preparatory steps must be taken before this is done. It is also important to note that changing the location here simply tells Exclaimer Mail Archiver where to find the store - it does not physically move the store (this must be done by an Administrator via the operating system). For further information please refer to moving an existing store [pg.131].
Store Data > This location requires credentials	If a user name and password is required to access the location of the store, this check box should be selected and the required user name and password should be entered.
Search Index > Location	<p>When a store is added [pg.126], an associated search index [pg.157] is automatically created in the same location as the store. If required, use the change location button to specify an alternative location for the index. For optimal performance it may be necessary to have the store and index location in different places.</p> <p>Care should always be taken before moving an index to another location and a number of preparatory steps must be taken before this is done.</p> <p>For further information please refer to the moving an existing index section [pg.168].</p>
Search Index > Update Index	<p>Messages are added to the store almost immediately by the journal mailbox importer however they are not shown in a user's search results until they are indexed.</p> <p>If a store contains 5000 messages or fewer, the system forces an index update automatically every two seconds (because there are relatively few messages, this has no impact upon performance). Once a store exceeds 5000 messages, the frequency with which an index is updated is determined here.</p> <p>Use these options to determine the frequency with which the search index for this store is updated. Here, you can choose a predefined time interval (for example, every 30 minutes), or at a specific time each day (for example, you may prefer to update the index when staff are not working) or when a given number of messages are waiting to be indexed.</p>
Defragmentation	<p>Over a period of time, the search index for a store can become fragmented - as messages are removed because the retention period is reached, or when an index is resynchronized, so white space can be left behind.</p> <p>Defragmentation is the process of removing this white space; this reduces the physical size of the index and improves efficiency.</p> <p style="text-align: right;">.../continued</p>

Option	Summary
	Use these options to determine the frequency with which the search index for this store is automatically defragmented. Here, you can choose a predefined time interval (for example, every 30 minutes), or at a specific time each day (for example, you may prefer to update the index when staff are not working). Alternatively, you can choose to never run the defragmentation process.

NOTE	Any changes made to store settings will be shown in the auditing log. This is particularly important for legal hold and retention period settings, so - for example - a user cannot change settings surreptitiously in order to remove incriminating messages.
------	--

Storage – Availability Settings

Each [store](#) is associated with its own settings which control whether or not the [store](#) is available for updates and searches, together with [retention period](#) and [legal hold](#) settings. These options are included on the [availability](#) tab:



Options on this tab are summarized below:

Option	Summary
Available to search	This check box determines whether or not the contents of this store can be searched. Although security permissions [pg.121] can be set to specify which users can search the store, there may be times where you need to use this option to quickly disable searching, irrespective of security permissions (for example, if there is a network/hardware problem or a corruption).
Can add new messages	If required, use this option to prevent further messages being added to the store (for example, if there is a network/hardware problem or corruption).
Legal hold	This option can be used to prevent any 'tampering' with the content of the store - for example, if there is an ongoing internal or legal investigation. When this check box is selected, it is not possible to remove email messages from the store, even if messages reach the specified retention period (see next page).

.../continued

Option	Summary
Retention period	Currently, this is the only means by which messages are deleted from an archive store. When a message becomes one day older than the specified retention period , it is deleted from the store. The only exception to this is if the legal hold setting is selected for the store; in this case, the retention period is ignored (and is greyed out) so messages are not removed. By default, the retention period is set to twenty five years but a common setting is seven years. When a message meets the retention period and is deleted, this logs an event in the Exclaimer event log .

NOTE

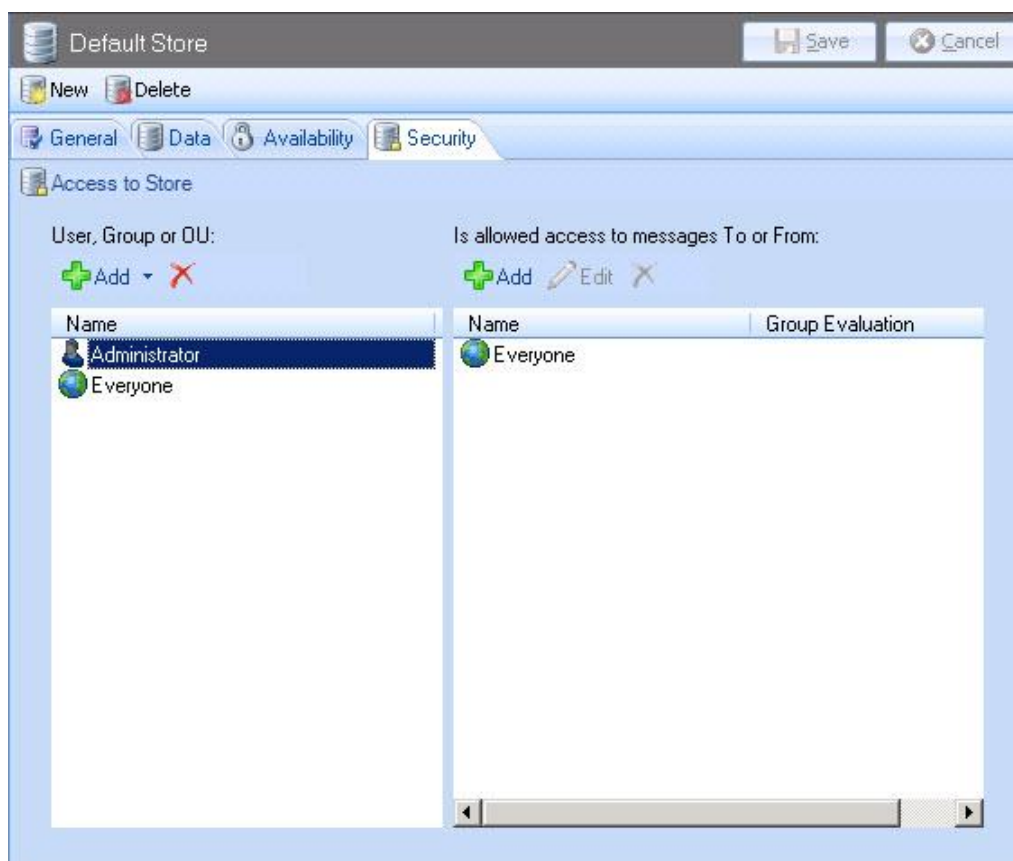
Any changes made to store settings will be shown in the auditing log. This is particularly important for **legal hold** and **retention period** settings, so - for example - a user cannot change settings surreptitiously in order to remove incriminating messages.

Storage - Security

Each [store](#) is associated with its own [security permissions](#) that are used to determine which users can access it (via. [search \[pg.177\]](#) options) and what level of access those users have.

By default when a store is created, the user creating the store has access to [Everyone's](#) email messages. All other users have access to only their [own](#) messages.

However, access permissions can be defined with as much or as little granularity as required - for example, you can grant specified users access to all messages in the [store](#), just their own messages in the [store](#), all messages for a specified [Active Directory](#) group (and/or group members), a specific email address, etc. (see page 124 for a summary of all options). These permissions are defined on the [security](#) tab:



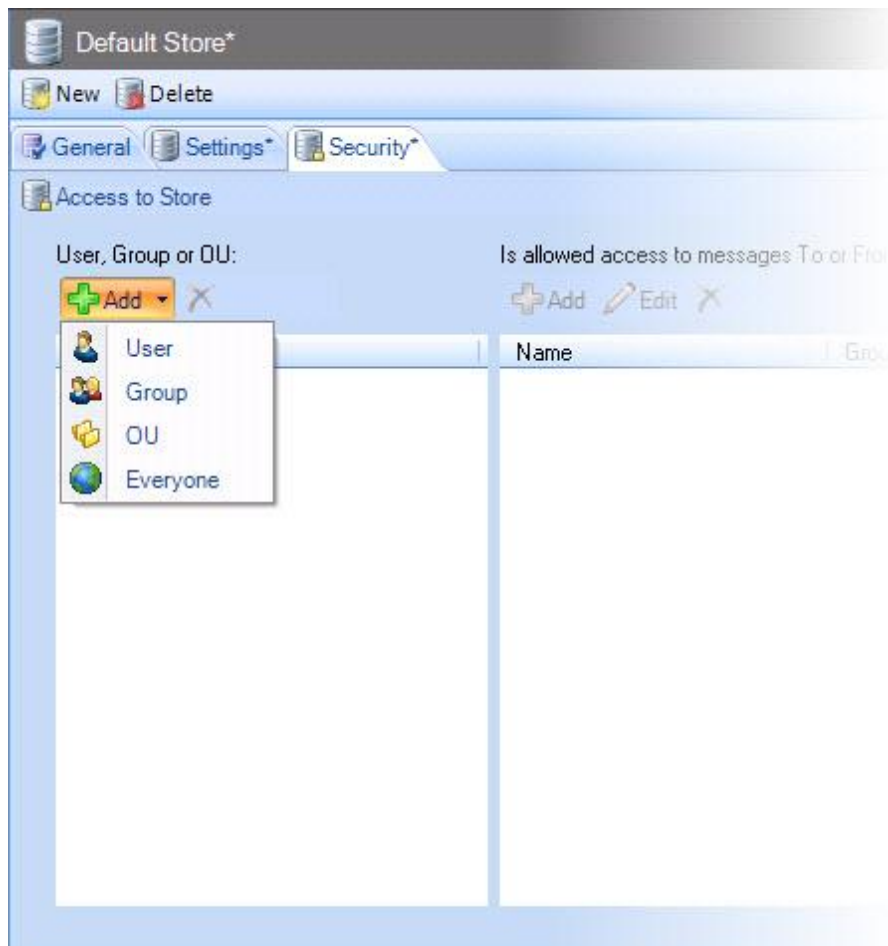
Here, [users](#), [groups](#) or [organizational units \(OUs\)](#) are [added in the left-hand pane \[pg.122\]](#) and then their access permissions are [added in the right-hand pane \[pg.123\]](#). If required, you can also [edit \[pg.124\]](#) or [remove \[pg.124\]](#) existing permissions.

NOTE

An **organizational unit** is an Active Directory container into which users, groups, computers, and other organizational units can be placed.

Adding a User, Group, Organizational Unit or Everyone

To add permissions for a [store](#), you should first add the required [user](#), [group](#) or [organizational unit](#) for whom permissions will be set. Alternatively, you can choose to add [everyone](#). To do this, select the appropriate item from the [add](#) menu:

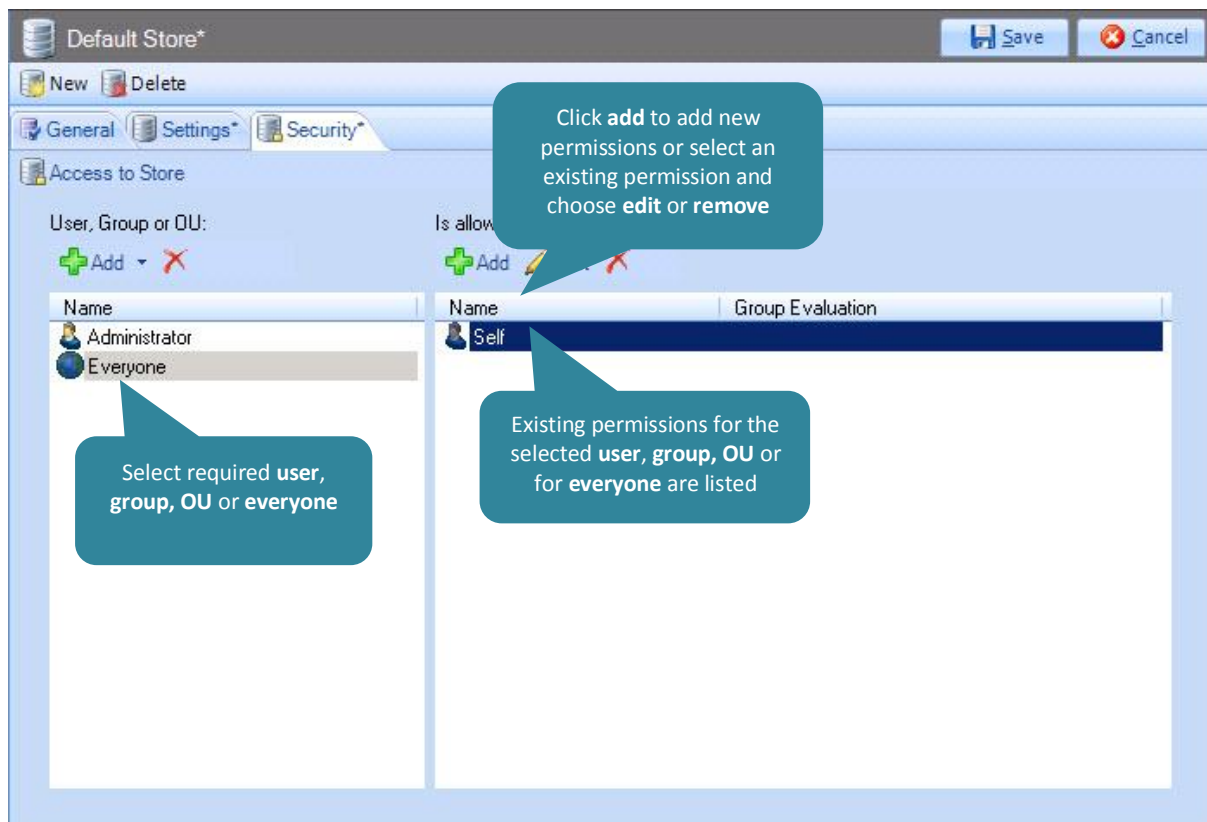


Selecting a [user](#), a [group](#) or [organizational unit](#) will display a selection window. For example, choosing to add an [OU](#) displays the [Active Directory Container](#) window.

Simply navigate the selection window and select the required entry (choosing to add [everyone](#) simply adds this entry to the left-hand pane, without opening a selection window). Having added required users, groups and OUs, select each entry in turn and add required [permissions](#) [pg.123].

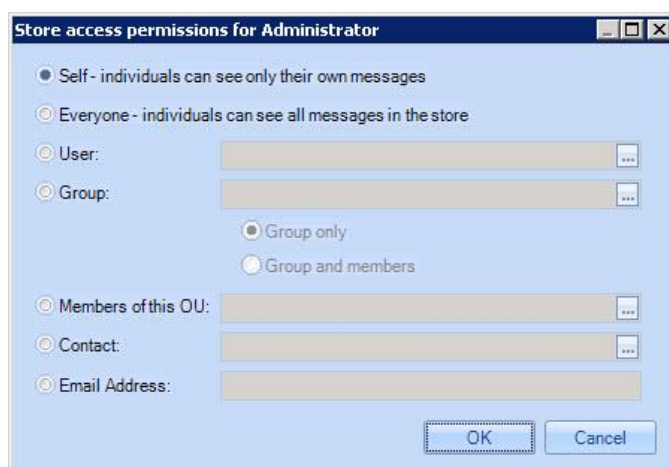
Adding or Updating Access Permissions

To set permissions for a [user](#), a [group](#) or [organizational unit](#) (or for [everyone](#)), select the required entry in the left-hand pane; this activates options in the right-hand pane:



In some cases, suggested permissions are automatically added. For example, when [everyone](#) is added to the left-hand pane, default access permissions are set to [self](#) in the right-hand pane - i.e. everyone should have access to their own emails in the [store](#).

To add permissions, click the [add](#) option (at the top of the right-hand pane) to open the [store access permissions](#) window and set required permissions for the selected entry:



These options are summarized below:

Option	The Selected User Will Have Access To...
Self	Only to their own email messages in this store .
Everyone	All email messages in this store .
User	Any email messages in this store sent or received by the Active Directory user (use the [...] button to browse and select the required user).
Group	Any email messages in this store sent or received by the selected group . Choose from: <ul style="list-style-type: none">• Groups only. The selected entry can access email messages sent to/from the selected group name (use the [...] button to browse and select the required group)• Group and members. The selected entry can access email messages for any members within the selected group and email messages which are sent to/from the group name (use the [...] button to browse and select the required group).
Members of this OU	Any email messages in this store for members of the selected organizational unit (use the [...] button to browse and select the required organizational unit).
Contact	Any email messages for a specified contact - i.e. an external party who has been added to the Active Directory as a contact (for example, a supplier).
Email Address	Any email messages sent to or from a specified email address.

Removing Permissions

To remove permissions that have already been defined for a [user](#), a [group](#) or [organizational unit](#) (or for [everyone](#)), select the required entry in the left-hand pane. Any existing permissions for the selected entry are displayed in the right-hand pane - simply select the required permission and click the [delete](#) icon (the red cross at the top of the right-hand pane).

Alternatively, you can entirely remove a [user](#), a [group](#), an [organizational unit](#) or an [everyone](#) entry. To do this, select the required entry in the left-hand panel and click the [delete](#) icon (the red cross at the top of the left-hand pane).

Editing Existing Permissions

To edit permissions that have already been defined for a [user](#), a [group](#) or [organizational unit](#) (or for [everyone](#)), select the required entry in the left-hand pane.

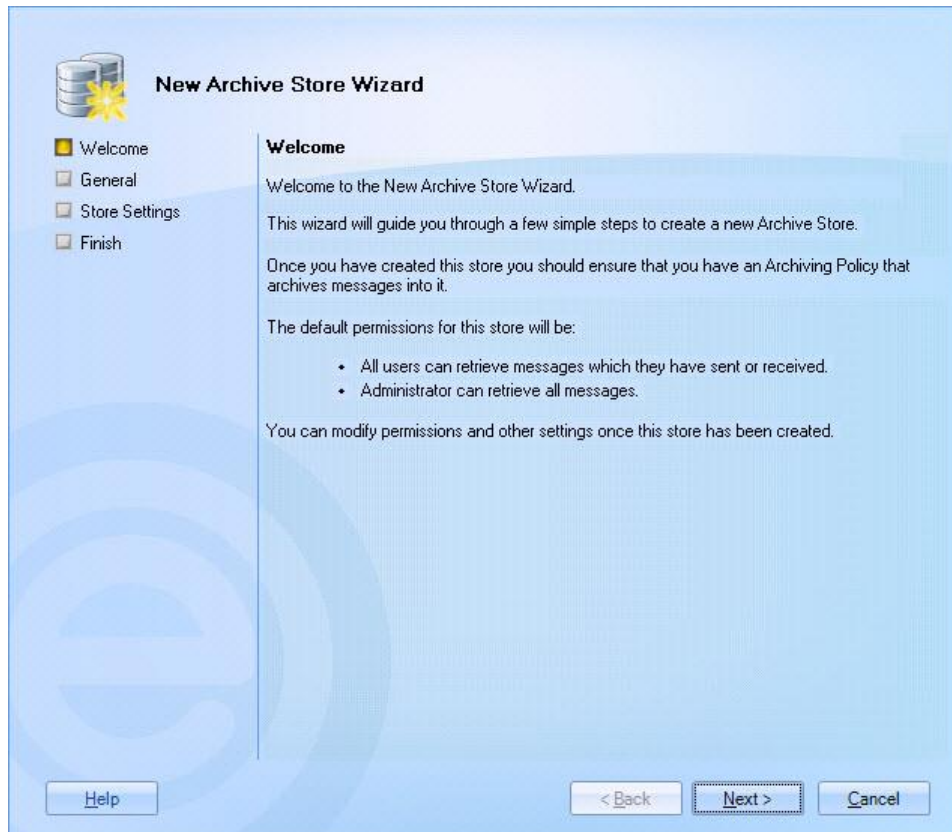
Any existing permissions for the selected entry are displayed in the right-hand pane. From here, simply select the required permission and click the [edit](#) button (at the top of the right-hand pane) to open the [store access permissions \[pg.124\]](#) window and make required adjustments.

Note that any changes made do not take effect until the [save](#) option is chosen (at the top of the console). Alternatively choose [cancel](#) to abandon all changes.

Adding a New Store

To add a new [store](#), follow the steps below:

1. Select the [storage](#) branch of the console tree. All existing [stores](#) are displayed in the [stores \[pg.112\]](#) tab.
2. Select the [new](#) option from the toolbar to launch the [new archive store wizard](#) at the [welcome](#) page:



The default permissions for a new store are:

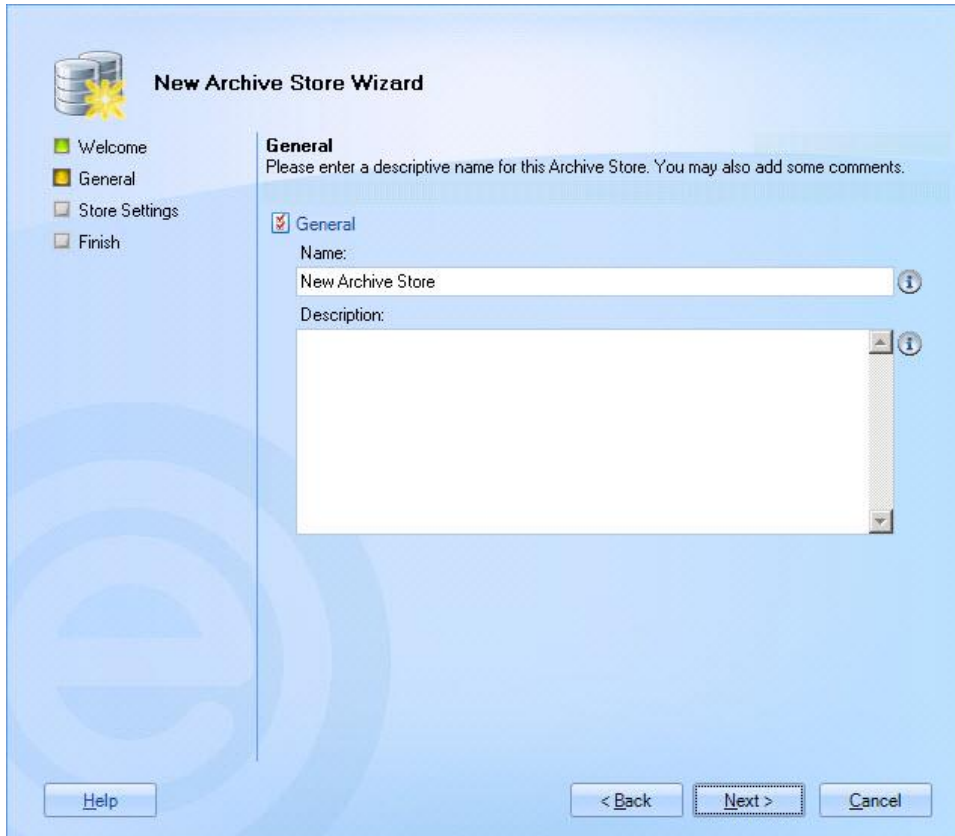
- All users have access to their own email in the store.
- The user that is creating the store has access to all email in the store.

NOTE

Alternatively, you can select the **new archive store** option from the [actions pane \[pg.36\]](#) to launch the **new archive store wizard**.

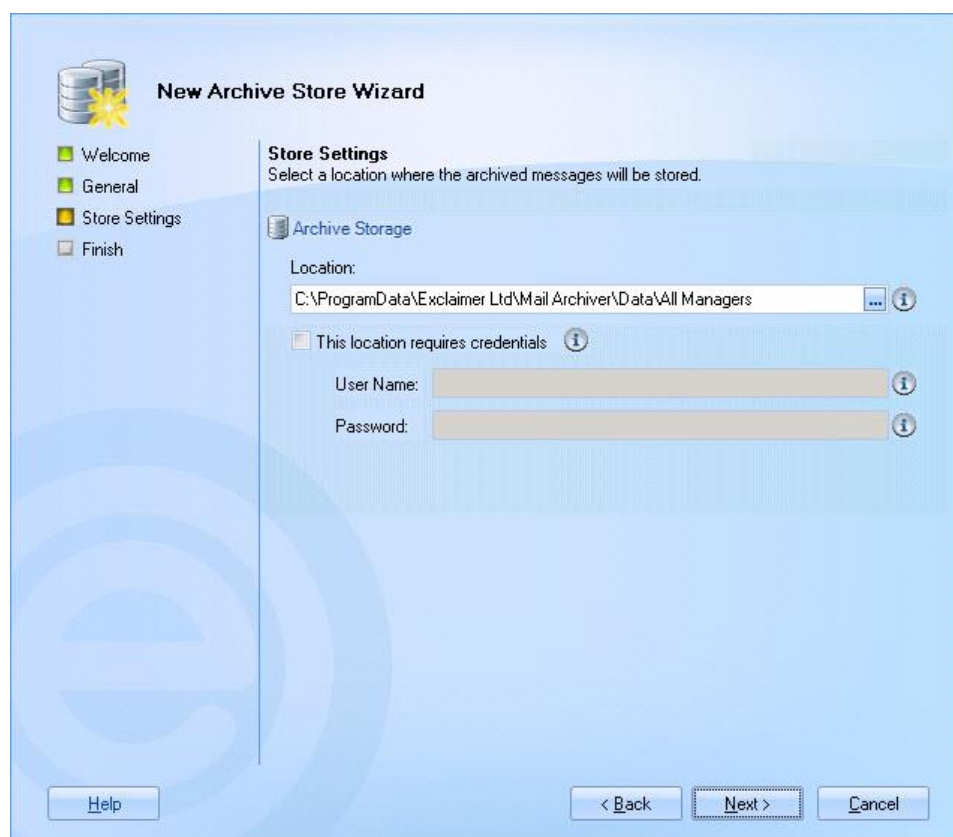
3. Click [next](#) to define [general settings](#) [pg.115] for the [store](#), where the [store](#) name and any required descriptive information can be entered. Each store must have a unique [name](#). The name entered here is displayed in the [Exclaimer console tree](#) [pg.31], and in the [stores list](#) [pg.112].

The [description](#) can be used to add any useful information for the [store](#) - for example, usage notes, version history, background or explanatory information:

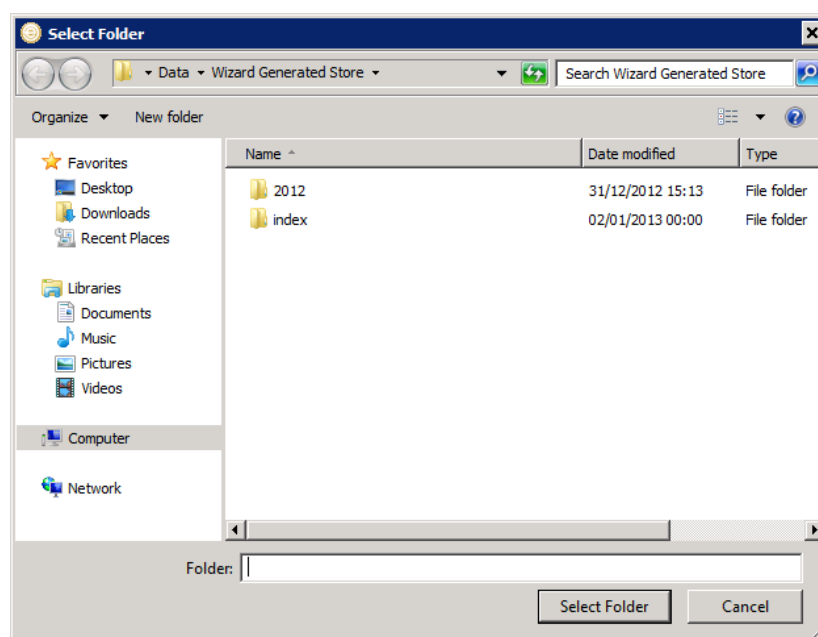


The image shows a screenshot of the 'New Archive Store Wizard' window. The window has a light blue background and a title bar. On the left side, there is a vertical pane with a tree view containing four items: 'Welcome' (with a green square icon), 'General' (with a yellow square icon and highlighted), 'Store Settings' (with a grey square icon), and 'Finish' (with a grey square icon). Above this tree is a small icon of a database cylinder with a yellow starburst. The main area of the wizard is titled 'General' and contains the text: 'Please enter a descriptive name for this Archive Store. You may also add some comments.' Below this text, there is a checkbox labeled 'General' which is checked. Under the checkbox, there are two input fields: 'Name:' with a text box containing 'New Archive Store', and 'Description:' with a larger text area. Both input fields have an information icon (i) to their right. At the bottom of the window, there are three buttons: '< Back', 'Next >', and 'Cancel'. A 'Help' button is located in the bottom left corner.

4. Enter the required name and descriptive information, then click [next](#) to define [store settings](#) [pg.116]:

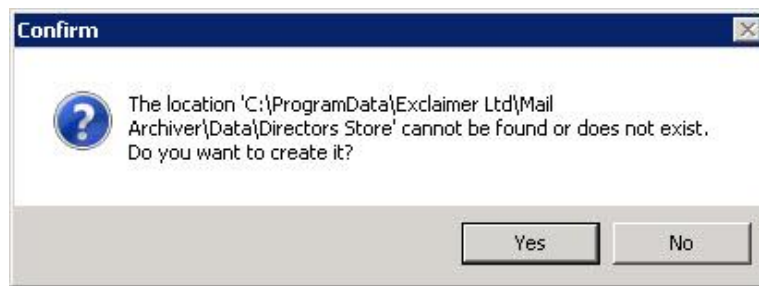


5. Use the [...] button to open the [browse for folder](#) window and select a location for the new [store](#). The default location is a [data](#) folder within your [Exclaimer Mail Archiver](#) configuration folder structure; from here you can either create a new sub folder for the [store](#), or browse to a completely different location if required:

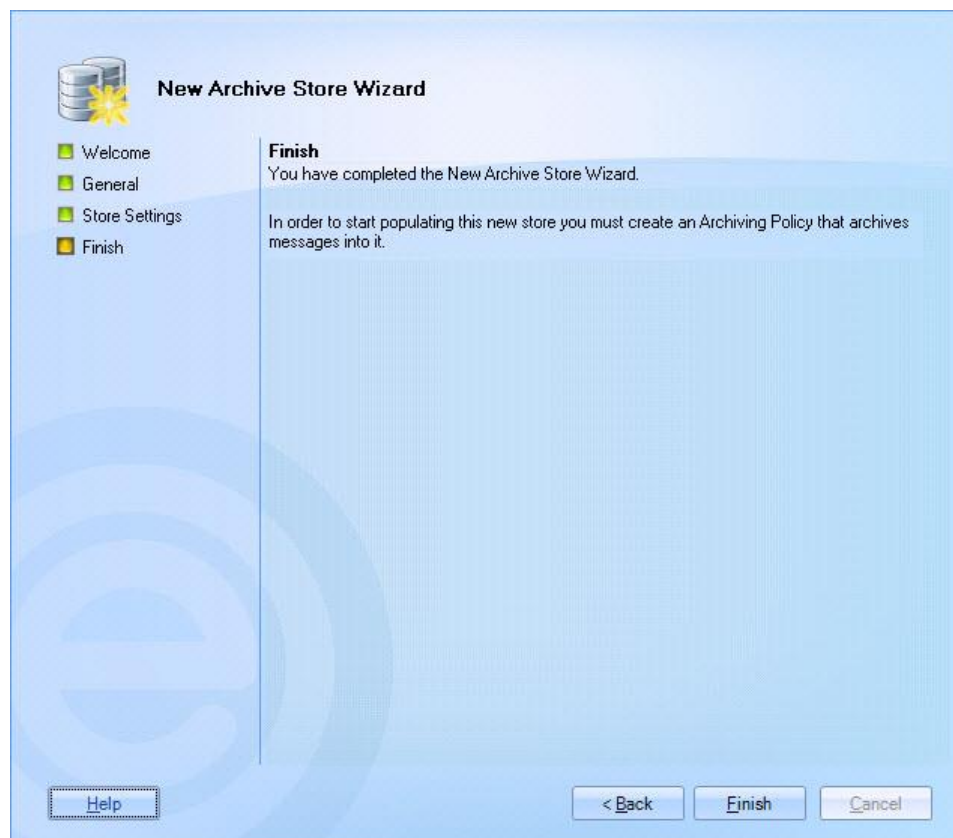


6. Having selected (or created) a location, click [OK](#) to exit back to the [store settings](#) page. If the selected location does not yet contain a [store](#), the [location](#) field will be displayed with a warning symbol.

- Click [next](#) to continue. A prompt is displayed, advising that the specified [store](#) does not exist and asking if it should be created:



- Click [yes](#) to create the [store](#) and exit back to the [finish](#) page for the [new archive store wizard](#):



- Click [finish](#) to exit back to the [Exclaimer console](#) [pg.31]. The new [store](#) is added to the console tree and is available for use when defining [archiving policies](#) [pg.61]. However, before using the store it is advisable to review [data settings](#) [pg.116], [availability settings](#) [pg.119] and [security settings](#) [pg.121].
- Click [save](#) at the top of the console window to save changes.

Updating an Existing Store

To update an existing [store](#), simply select the store (either from the [console tree](#) [pg.35] or from the [stores tab](#) [pg.112] and update [general information](#) [pg.115], [data settings](#) [pg.116], [availability settings](#) [pg.119] and [security permissions](#) [pg.121] as required.

When a [store](#) has been changed but not saved, the [storage](#) branch (and the associated child branch for the updated [store](#)) is displayed with an asterisk (*) symbol. When the updated [store](#) is selected, you can see which tabs contain unsaved changes by looking for an asterisk to the right of the tab name. When you are satisfied that all required changes have been made correctly, click [save](#) to save the new settings. All asterisk symbols are cleared once changes have been saved.

Moving an Existing Store

The location of a [store](#) is defined on the [data](#) [pg.116] tab for the [store](#):

The screenshot shows the 'Default Store' configuration window with the 'Data' tab selected. The window has a title bar 'Default Store' and buttons for 'Save' and 'Cancel'. Below the title bar are 'New' and 'Delete' buttons. The 'Data' tab is active, showing 'Store Data' and 'Search Index' sections. The 'Store Data' section has a 'Location' field with the path 'C:\ProgramData\Exclaimer Ltd\Mail Archiver\Data\Default Store' and a 'Change location...' button. There is a checkbox for 'This location requires credentials' and fields for 'User Name' and 'Password'. The 'Search Index' section has a 'Location' field with the text 'The Index files are currently located in the same folder as the Store Data' and a 'Change location...' button. Below this is an 'Update Index' section with radio buttons for 'Every' (30 Minutes) and 'Daily at' (23:59), and a checkbox for 'Force an update when' (500 messages are queued for indexing).

Default Store

New Delete

General Data Availability Security

Store Data

Location:

C:\ProgramData\Exclaimer Ltd\Mail Archiver\Data\Default Store

Change location...

☐ This location requires credentials

User Name:

Password:

Search Index

Location:

The Index files are currently located in the same folder as the Store Data

Change location...

Update Index:

☒ Every: 30 Minutes

☐ Daily at: 23:59

☐ Force an update when 500 messages are queued for indexing

[Stores](#) can be moved if required, however this must be done with care, using steps listed on page 132. **It is important to note that changing the location here simply tells Exclaimer Mail Archiver where to find the store - it does not physically move it** (this must be done by an Administrator via the operating system).

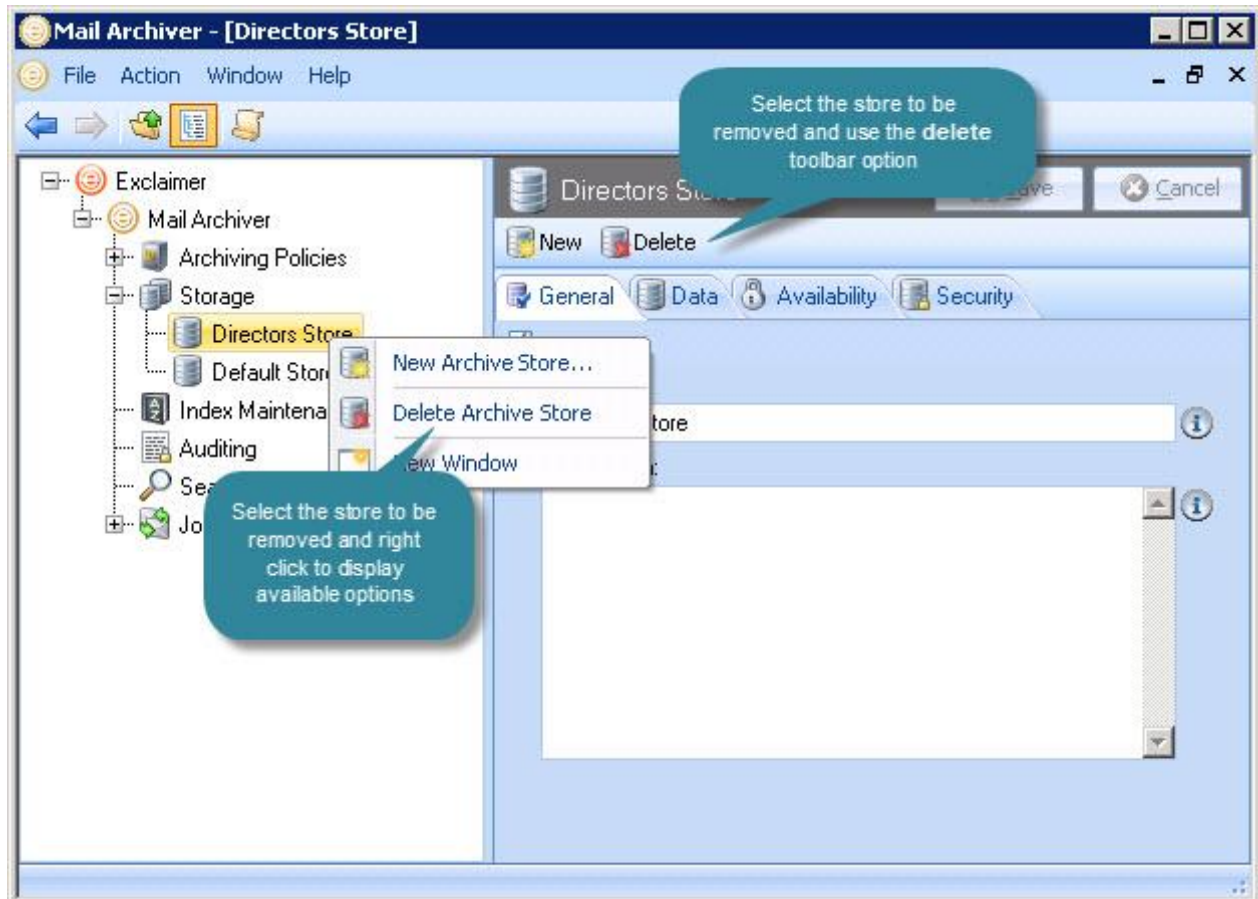
Required Sequence for Moving a Store

To change the [location](#) of a store, the following tasks should be completed in the sequence listed here:

1. Ensure that all users are logged out from the [Mail Archiver search \[pg.177\]](#).
2. Disable [journal mailbox importing](#) from the [settings tab on the mail archiver branch of the console tree \[pg.45\]](#) and click [save](#) (at the top of the console).
3. Copy the physical [store](#) (using the operating system). You should copy the folder that is shown as the store [location](#) on the [data tab \[pg.116\]](#), including all sub folders and files.
4. Change the [location](#) on the [data tab for the store \[pg.116\]](#). If [store](#) files have been copied correctly, the [location](#) field should not display a warning icon once it has been modified (a warning icon is only displayed if no [store](#) is found for the specified [location](#)).
5. Confirm that the [store](#) can be [searched \[pg.177\]](#) in its new location.
6. Re-enable [journal mailbox importing](#) from the [settings tab on the mail archiver branch of the console tree \[pg.45\]](#).
7. Remove the original [store](#) files (using the operating system).
8. If required, [move the associated store index \[pg.168\]](#).

Removing a Store

To remove an existing [store](#), select the [store](#) (either from the [console tree](#) [pg.35] or from the [stores tab](#) [pg.112]). Then, either right click and select [delete](#) from the context menu, or click the [delete](#) button on the toolbar:



NOTE

It is not possible to remove a **store** that is referenced by a **policy**. If this is the case, the **policy** must be [removed](#) [pg.94] prior to the store being removed.

Having chosen to delete a [store](#), you are asked [are you sure you want to delete this store?](#) Click [yes](#) to confirm the deletion or [no](#) to abandon the task. Finally, click [save](#) to save changes.

NOTE

A **store** is not removed until settings have been saved. If you exit without saving (or if you **cancel** changes), the **store** will be reinstated in the console tree. Also note that removing a **store** in this way removes it from Exclaimer Mail Archiver but the physical **store** is not deleted from the disk (which means that it can be [restored](#) [pg.134] at a later date if required). Permanently deleting a store from the disk can only be done by an Administrator via the operating system.

Restoring a Deleted Store

When a [store](#) is removed using the process described on page 133, it is removed from [Exclaimer Mail Archiver](#) but it is not physically removed from the disk. This means that the [store](#) can be restored later, if required.

To restore a previously deleted [store](#), follow the standard process for [adding a new store](#) [pg.126] with the following changes:

1. When specifying a [location](#) in [step 4](#) of the [add new store](#) wizard, click the browse [...] button and navigate to the folder which contains your [archive stores](#).
2. Select the required [store](#) – if required, hover your cursor over a [store](#) name to check the date/time it was created.
3. When you click [next](#) to continue, a warning message is displayed, advising that you have chosen to connect to an existing [store](#). If you are satisfied that this is correct, continue with the [add new store](#) wizard in the usual way.

The Batch Importer Wizard

The [batch importer](#) can be used to import legacy email messages into [Exclaimer Mail Archiver](#). Legacy email messages can be imported from any of the following sources:

- Existing email messages in [user mailboxes](#) [pg.137]
- Existing email messages in [Exchange public folders](#) [pg.151] (i.e. [public folders](#) which have been enabled to receive email, to be accessed by multiple users or have been used as an email repository so all users can see specific emails)
- Existing [Outlook](#) backup files ([PST files](#) [pg.137])

Legacy emails can be archived using the [batch importer](#). The [batch importer](#) extracts messages from any of the above sources and archives them to a selected [store](#) [pg.110].

Required Preparation

In order to complete a batch import, [Exclaimer Mail Archiver](#) needs to access the mailboxes and public folders for users within your organization - i.e. it needs to have [impersonation rights](#). These rights are set by defining [Exchange Mailbox Access](#) in [Exclaimer Mail Archiver settings](#) [pg.45].

What Happens to the Legacy Sources After An Import?

Nothing happens to the source files used for a legacy import. Normally, when an email message is archived, the original message is deleted from the [journal mailbox](#). However, when legacy emails are imported using the [batch importer](#), the original data is not deleted.

What Happens if I attempt to Import Legacy Messages More than Once?

The batch import process automatically checks for duplicate messages. If a message already exists in the archive, it will not be imported again.

What Happens if a Legacy Message Cannot be Imported?

Once an import is complete, a summary page is displayed which shows the number of imported messages, together with the number of messages that could not be imported for different reasons - for example:

Message Statistics	
Total to import	9
Imported	8
Messages Ignored	
Already present in store	46
Outside specified date range	0
Messages Failed to Import	
Did not trigger any policies	4
Outside store retention period	0
Aborted due to error	0

The suggested process for handling messages that could not be imported is to check and update [policies](#) [pg.61] and settings in [Exclaimer Mail Archiver](#) and then re-run the [batch importer](#).

Automatic detection of duplicates will ensure that multiple copies of the same message are not added to [stores](#) [pg.110], but any messages that failed to trigger policies during the previous import will be evaluated again.

Similarly, if messages are not imported because they fall outside of a specified date range, the import can be re-run with alternative dates.

Any messages that fall outside the [retention period](#) for the [store](#) will not be archived to the [store](#) because they would then be immediately removed. If you require these messages to be imported, you should increase the [retention period](#) [pg.119] setting for that [store](#).

Importing User Mailboxes

To import a [user mailbox](#), follow the steps below:

1. Select [launch batch importer](#) from the actions pane in the [Exclaimer console](#) [pg.31] to start the [Exclaimer Mail Archiver batch importer](#) at the [welcome](#) page (alternatively, the [batch importer](#) can be launched from the [Windows start menu](#)):



NOTE

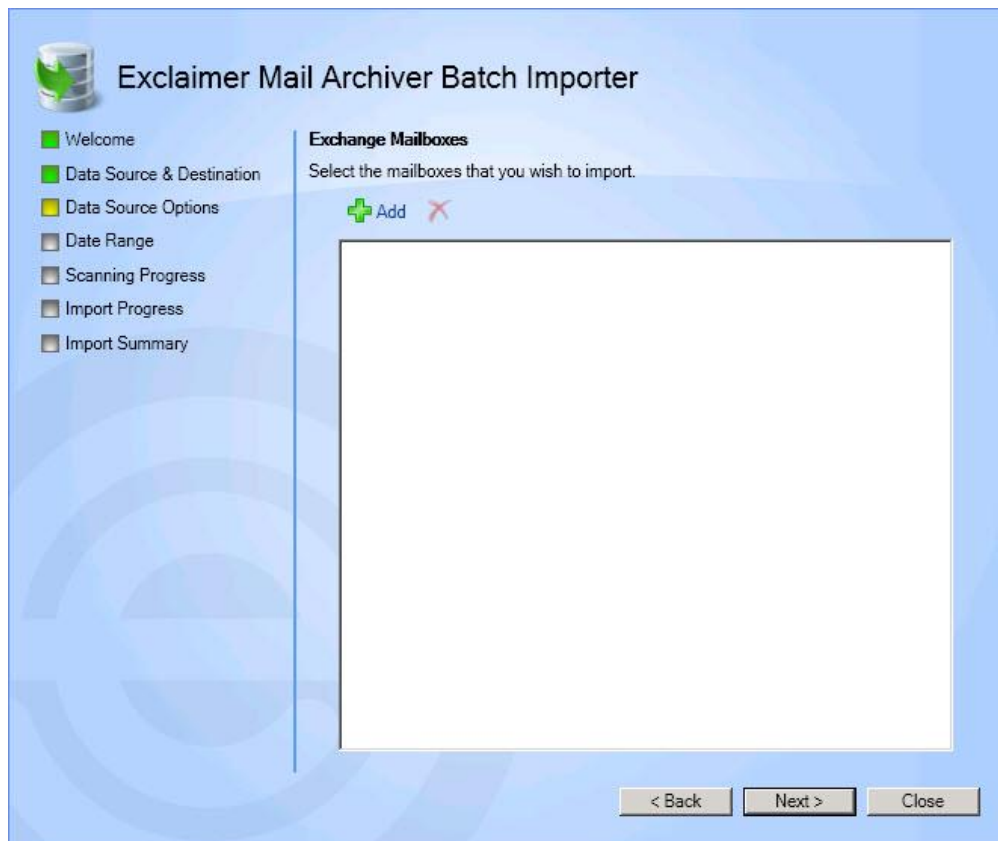
The **actions pane** cannot be displayed if the **search** window is currently open in the **Exclaimer console**. If you have been using the **search** facility, ensure that another branch of the **console tree** is selected so that you can display the **actions pane** and select the **launch batch importer** option.

2. Click [next](#) to access the [data source & destination](#) page, where you can choose the required source for legacy emails:



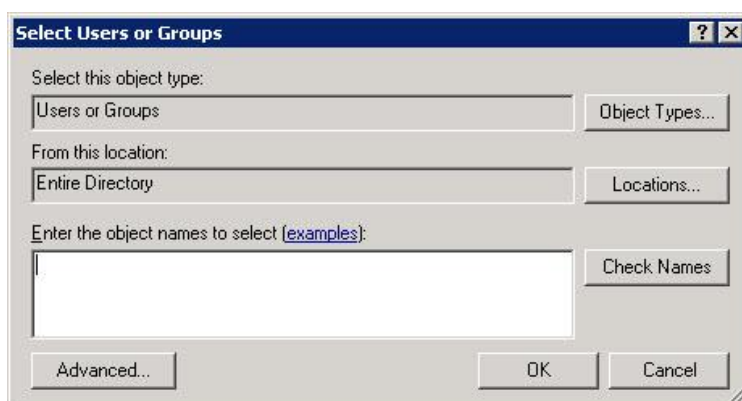
3. Choose the [Exchange user mailboxes](#) option and then use the [select the archive store that the messages will be copied into](#) drop-down list to choose the required archive store. Imported messages will be copied into this store.

4. Click [next](#) to confirm selections and move to the [Exchange mailboxes](#) page:



The [batch importer](#) requires access to user mailboxes within the organization - i.e. it needs to have impersonation rights. These rights are set by defining [Exchange Mailbox Access](#) in [Exclaimer Mail Archiver settings](#) [pg.45] and this is the account that is automatically used here.

5. To choose mailboxes to import, click [add](#) to open the [select users or groups](#) window and select the required user:



If you are importing the mailbox for a specific user, the simplest approach is to ensure that the [object type](#) is set to [users or groups](#), the [location](#) is set to [entire directory](#) and then enter the required user name. However, you can change the [object type](#) and [location](#) fields as needed.

For further help about searching for objects, click the **examples** link above the **enter the object name to select** field.

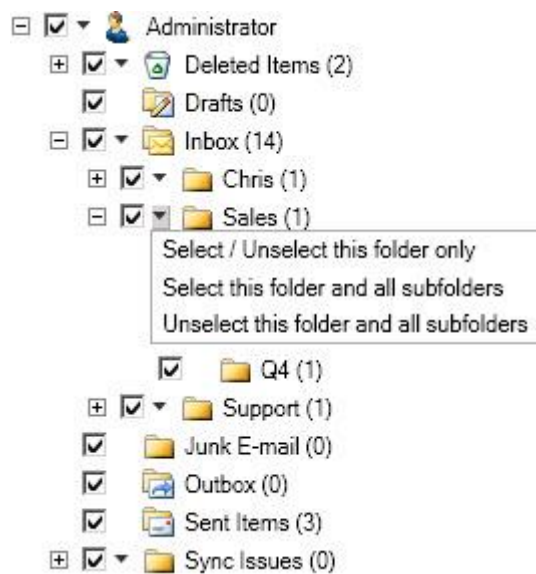
6. Having confirmed an [object name](#) (i.e. a user name), the user is added to the [Exchange mailboxes](#) page and the mailbox structure for that user is displayed:



7. Expand the mailbox structure and select/de-select folders as required.

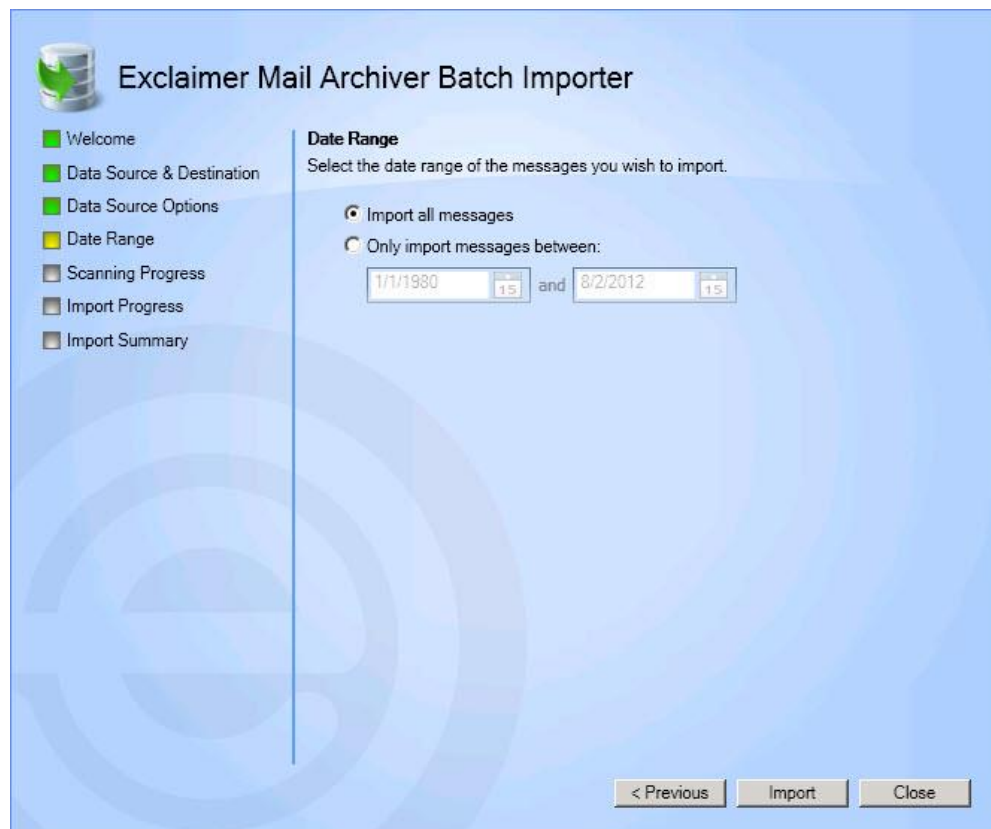
When navigating the folder structure, folders may be associated with a 'down arrow' icon, as well as a check box. This happens when a folder contains sub folders and, when the arrow is selected, options are displayed in a pop-up menu, so you can choose what action to take when selecting the folder. This is shown on the following page.

Folder navigation:



Simply click the required action from the pop-up menu to make a selection.

8. When you are satisfied with the selections made, click [next](#) to access [date range](#) options. Here, you can choose to [import all messages](#) or only those messages which fall within specified start/end dates:



9. Having set required date range options, click [import](#) to start the import process.

If no policies apply for a message, the message is not imported - see [what happens if a legacy email cannot be archived?](#) [pg.136] for further information.

10. Once the import is complete, an import summary is displayed:

Message Statistics	
Total to import	1
Imported	0

Messages Ignored	
Already present in store	0
Message class not recognised	0

Messages Failed to Import	
Aborted due to error	1

Here, you can see the total number of imported messages, together with the number of messages which were ignored and the number of messages which failed to import because no [policies](#) [pg.61] were triggered, because they exceed the [retention period](#) [pg.119] that has been set for the relevant [archive store](#) or because they were aborted due to an error (see page 156 for details about [handling aborted messages](#)).

11. From here, you can view a detailed import log by selecting the [view log](#) button. Alternatively, you can use the [retry aborted messages](#) button to try to import problem messages again.
12. Click [close](#) to exit from the [Exclaimer Mail Archiver batch importer](#).

NOTE

If the **delete log** check box is selected, the import log will be removed. If this option is de-selected, the log will be retained in the **ProgramData\Exclaimer Ltd\Mail Archiver\Import folder**. If you need to contact support regarding a problem with the batch importer they will require this log file.

Importing PST Files

To import a **PST** file, follow the steps below:

1. Select **launch batch importer** from the actions pane in the [Exclaimer console \[pg.31\]](#) to start the **Exclaimer Mail Archiver batch importer** at the **welcome** page (alternatively, the **batch importer** can be launched from the **Windows start menu**):



NOTE

The **actions pane** cannot be displayed if the **search** window is currently open in the **Exclaimer console**. If you have been using the **search** facility, ensure that another branch of the **console tree** is selected so that you can display the **actions pane** and select the **launch batch importer** option.

2. Click [next](#) to access the [data source & destination](#) page, where you can choose the required source for legacy emails:



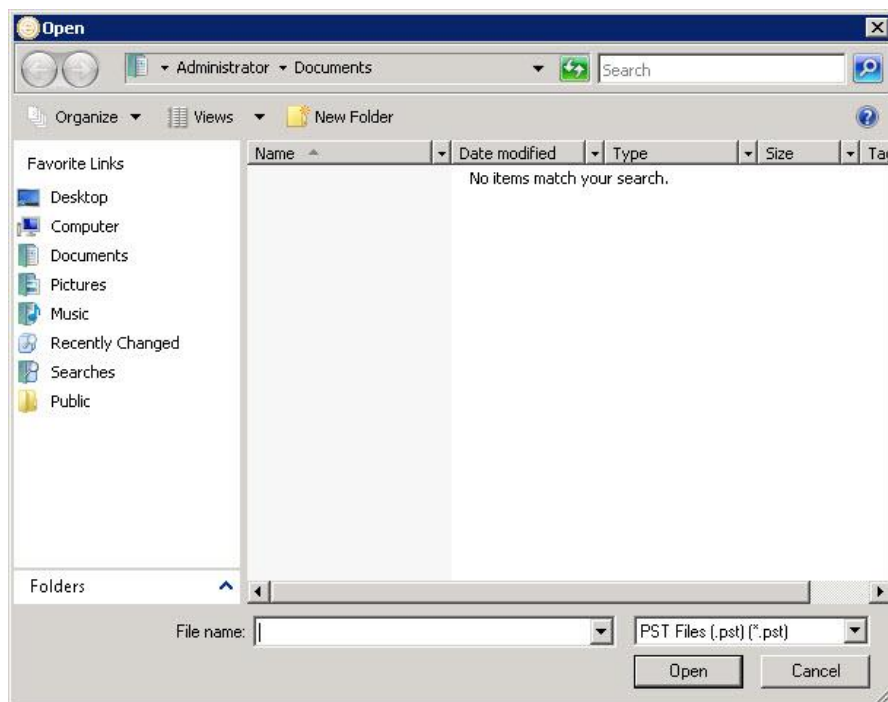
The screenshot shows the 'Exclaimer Mail Archiver Batch Importer' window. On the left is a sidebar with a list of steps: Welcome, Data Source & Destination (highlighted), Data Source Options, Date Range, Scanning Progress, Import Progress, and Import Summary. The main area is titled 'Data Source & Destination' with the instruction 'Specify where the messages are coming from and where they should be archived to...'. Below this, it says 'Select the source location of the messages that you wish to import:'. There are three icons: 'Exchange Mailboxes' (a yellow wireframe sphere), 'Exchange Public Folders' (a yellow wireframe sphere), and 'PST File' (a blue document icon with a yellow 'P' and 'S' and a file icon). The 'PST File' option is selected. Below the icons, it says 'Import from one or more PST files. This is the format used by Microsoft Outlook's archive function.' Then it says 'Select the Exclaimer Mail Archiver server that will import these messages:'. There are two input fields: 'Server name:' with 'localhost' and a 'Browse...' button, and 'Port:' with '53449'. At the bottom right are three buttons: '< Previous', 'Next >', and 'Close'.

3. Choose the [PST file](#) option.

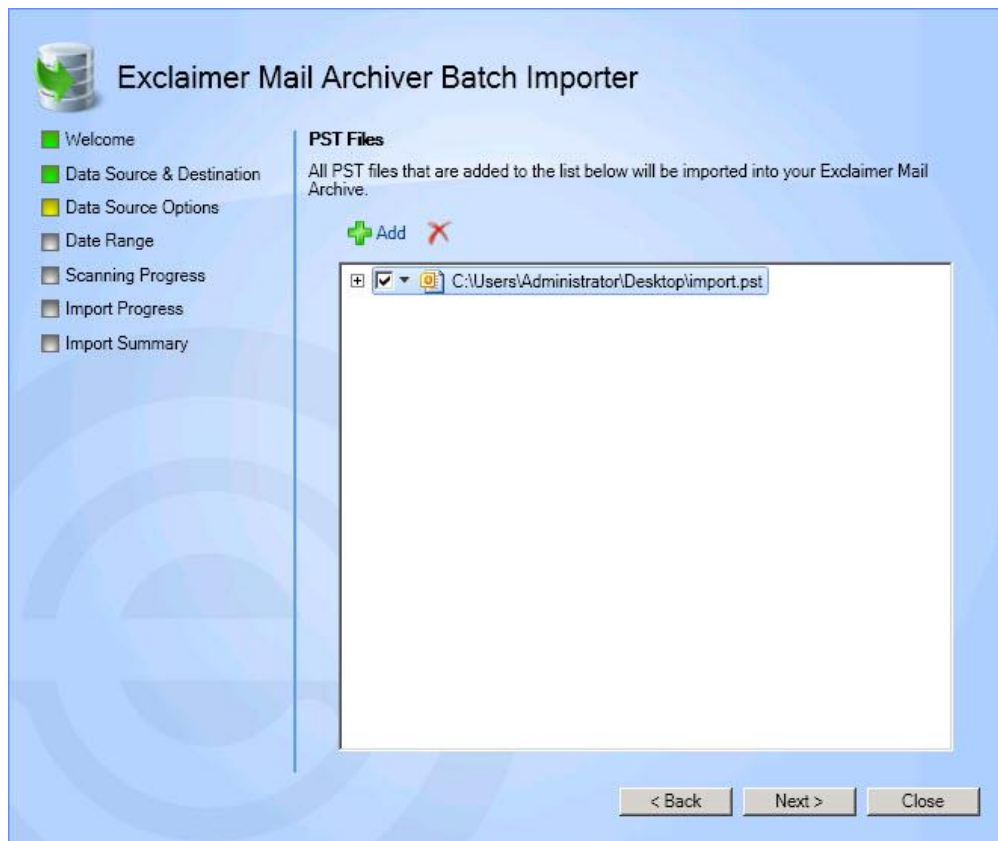
4. Click [next](#) to confirm selections and move to the [PST files](#) page:



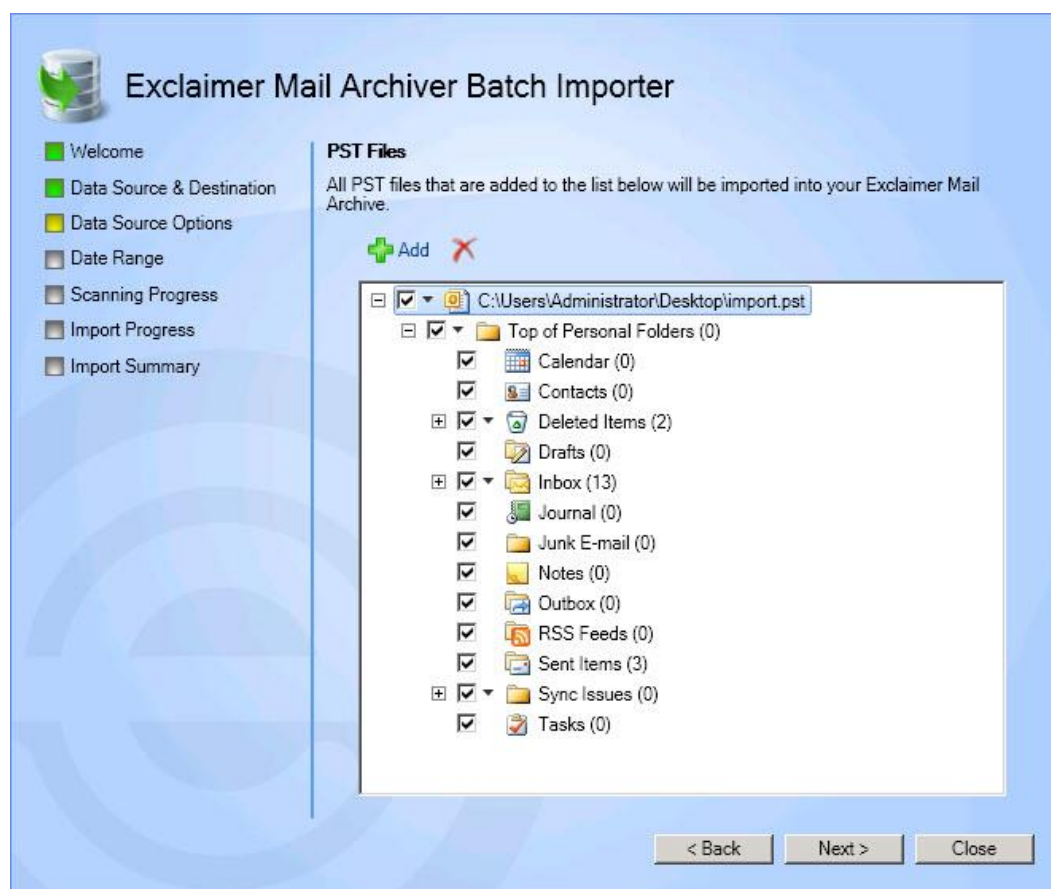
5. Click [add](#) to browse for the required [PST](#) file:



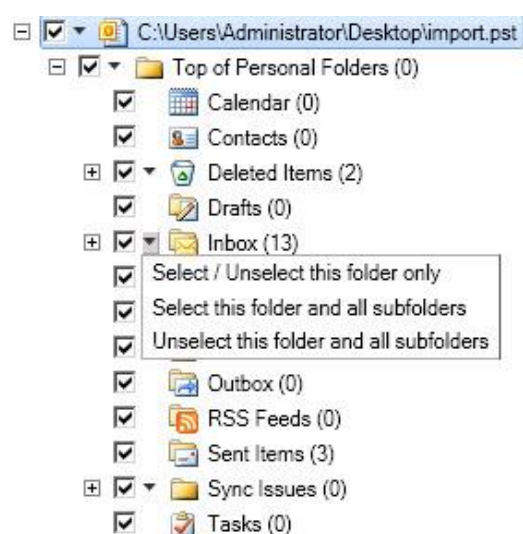
6. Having selected the required file, click [open](#) to return to the [Exclaimer Mail Archiver batch importer](#). The file is added to the [PST files](#) page:



7. Expand the selected PST file to display the full folder structure. If required, sub folders can be de-selected (i.e. excluded from the import):

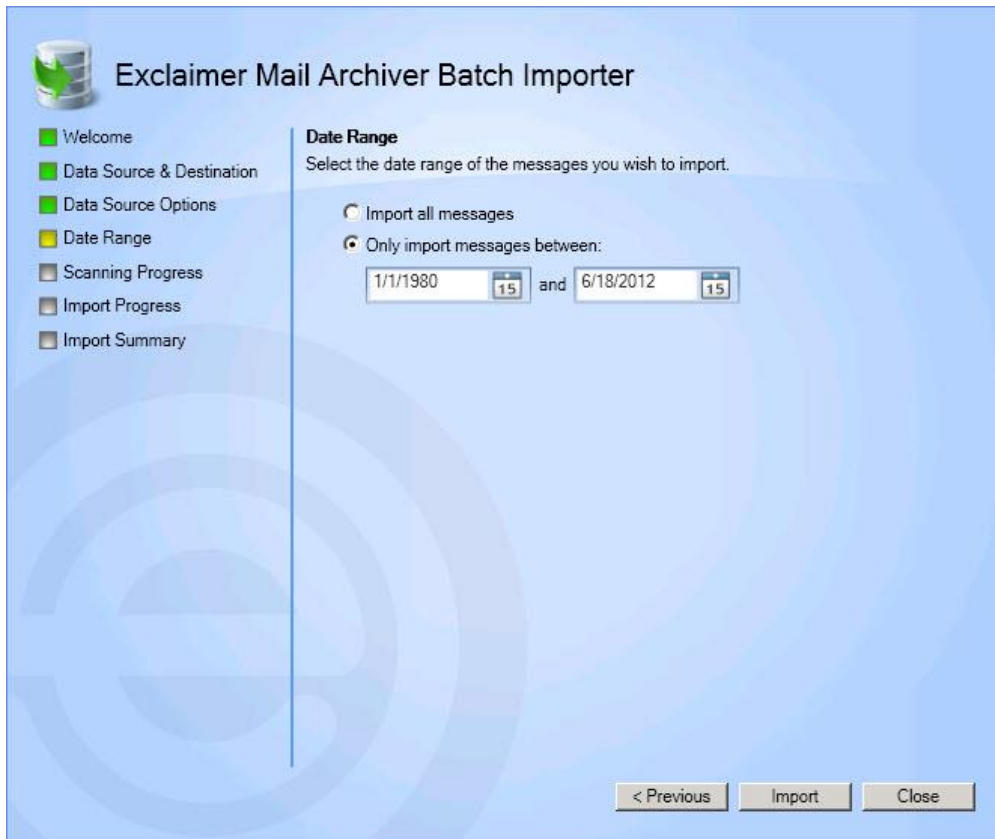


When navigating the folder structure, folders may be associated with a 'down arrow' icon, as well as a check box. This happens when a folder contains sub folders and, when the arrow is selected, options are displayed in a pop-up menu, so you can choose what action to take when selecting the folder. This is shown in the example below:



Simply click the required action from the pop-up menu to make a selection.

8. When you are satisfied with the selections made, click [next](#) to access [date range](#) options. Here, you can choose to [import all messages](#) or only those messages which fall within specified start/end dates:

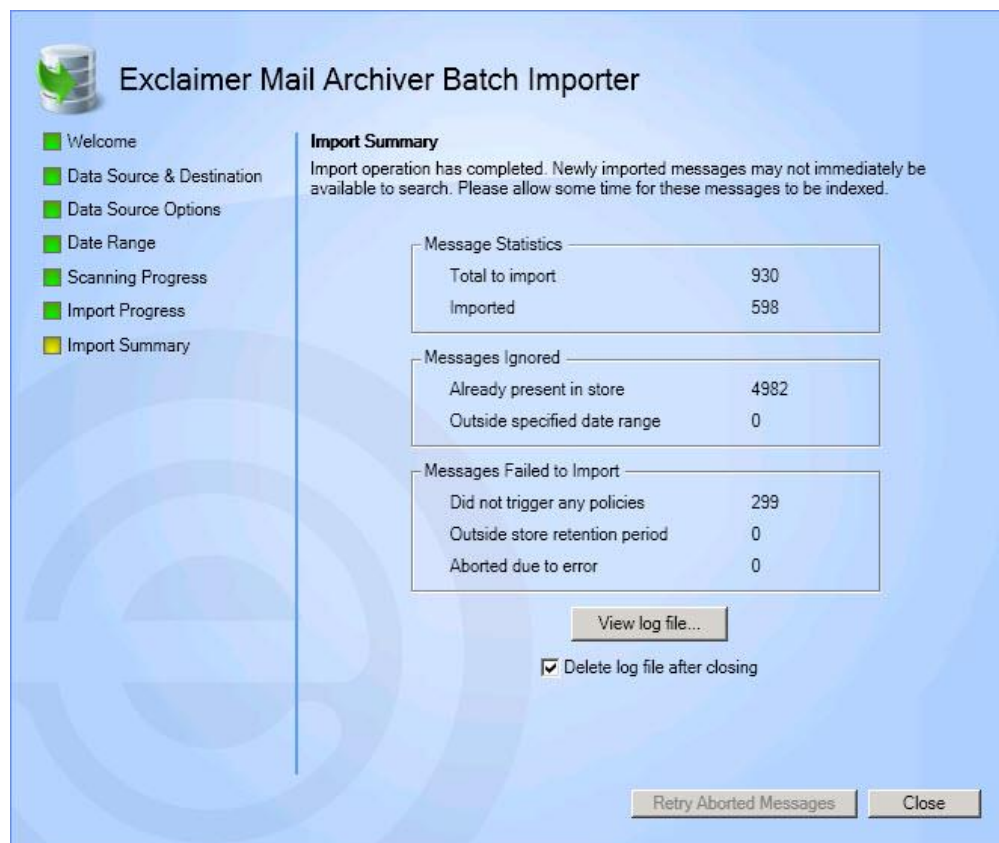


The screenshot shows the 'Exclaimer Mail Archiver Batch Importer' window. On the left is a vertical navigation pane with a list of steps: Welcome, Data Source & Destination, Data Source Options, Date Range (highlighted in yellow), Scanning Progress, Import Progress, and Import Summary. The main area is titled 'Date Range' and contains the instruction 'Select the date range of the messages you wish to import.' There are two radio button options: 'Import all messages' (unselected) and 'Only import messages between:' (selected). Below the second option are two date pickers. The first date picker shows '1/1/1980' and the second shows '6/18/2012', with a small calendar icon to the right of each. At the bottom right of the window are three buttons: '< Previous', 'Import', and 'Close'.

9. Having set required date range options, click [import](#) to start the import process. During processing, [archiving policies](#) [pg.61] are applied and messages are archived to the appropriate [archive store](#) [pg.110].

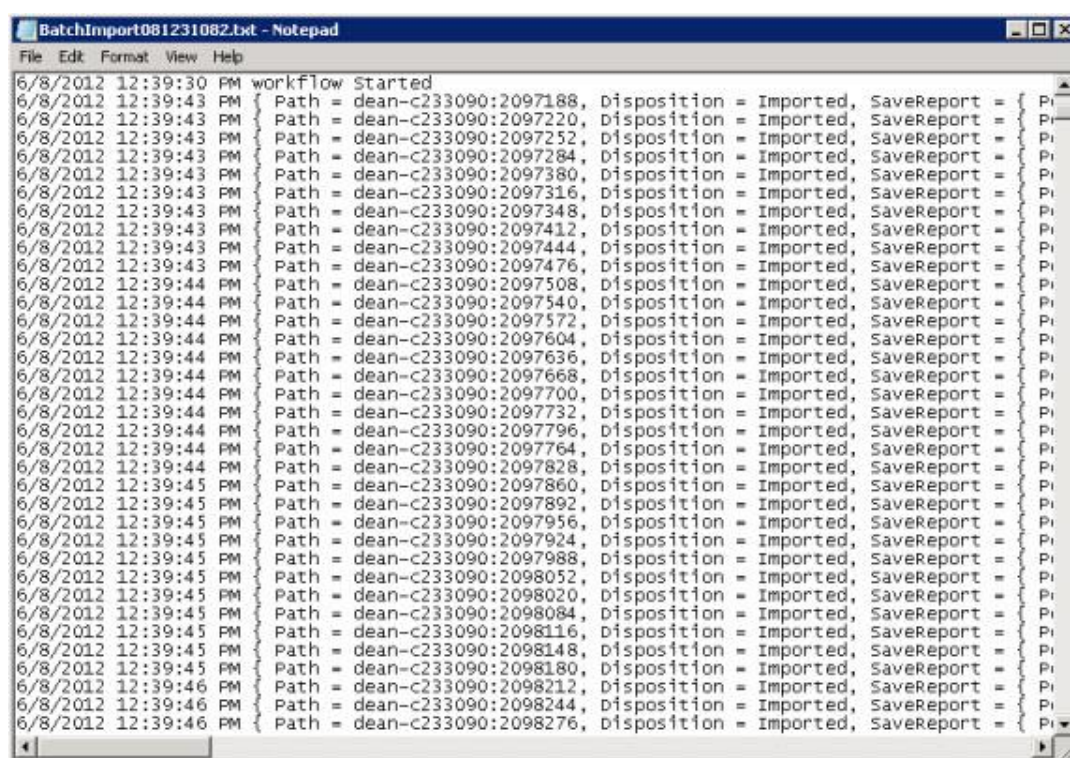
If no policies apply for a message, the message is not imported - see [what happens if a legacy email cannot be archived?](#) [pg.136] for further information.

10. Once the import is complete, an import summary is displayed:



Here, you can see the total number of imported messages, together with the number of messages which were ignored and the number of messages which failed to import because no [policies](#) [pg.61] were triggered, because they exceed the [retention period](#) [pg.119] that has been set for the relevant [archive store](#) or because they were aborted due to an error (see page 156 for details about [handling aborted messages](#)).

11. From here, you can view a detailed import log by selecting the [view log](#) button:



Alternatively, you can use the [retry aborted messages](#) button to try to import problem messages again.

12. Click [close](#) to exit from the [Exclaimer Mail Archiver batch importer](#).

NOTE

If the **delete log** check box is selected, the import log will be removed. If this option is de-selected, the log will be retained in the **ProgramData\Exclaimer Ltd\Mail Archiver\Import** folder. If you need to contact support regarding a problem with the batch importer they will require this log file.

Importing Public Folders

To import a [public folder](#), follow the steps below:


1. Select [launch batch importer](#) from the actions pane in the [Exclaimer console](#) [pg.31] to start the [Exclaimer Mail Archiver batch importer](#) at the [welcome](#) page (alternatively, the [batch importer](#) can be launched from the [Windows start menu](#)):



NOTE

The **actions pane** cannot be displayed if the **search** window is currently open in the **Exclaimer console**. If you have been using the **search** facility, ensure that another branch of the **console tree** is selected so that you can display the **actions pane** and select the **launch batch importer** option.

2. Click [next](#) to access the [data source & destination](#) page, where you can choose the required source for legacy emails:



The screenshot shows the 'Exclaimer Mail Archiver Batch Importer' window. On the left is a sidebar with a progress list: Welcome (green), Data Source & Destination (yellow), Data Source Options (grey), Date Range (grey), Scanning Progress (grey), Import Progress (grey), and Import Summary (grey). The main area is titled 'Data Source & Destination' with the instruction 'Specify where the messages are coming from and where they should be archived to.' Below this, it says 'Select the source location of the messages that you wish to import:' and shows three icons: 'Exchange Mailboxes' (orange wireframe), 'Exchange Public Folders' (blue wireframe), and 'PST File' (yellow document icon). The 'Exchange Public Folders' option is selected, and the text 'Import from Exchange Public Folders (via Exchange Web Services)' is displayed. Further down, it says 'Select the Exclaimer Mail Archiver server that will import these messages:' and provides input fields for 'Server name:' (containing 'localhost') and 'Port:' (containing '53449'), with a 'Browse...' button next to the server name. At the bottom right are three buttons: '< Previous', 'Next >', and 'Close'.

3. Choose the [Exchange public folder](#) option.

- Click [next](#) to confirm selections and move to the [public folders](#) page, where all available public folders are listed:

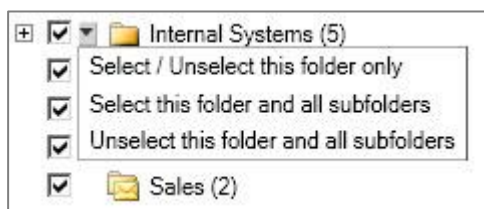


NOTE

The **batch importer** uses the access rights of the currently logged in user to access **public folders**. If you have changed the default permissions of all users having access to the entire **public folder** store you may need to run the **batch importer** as another user to access those public folders.

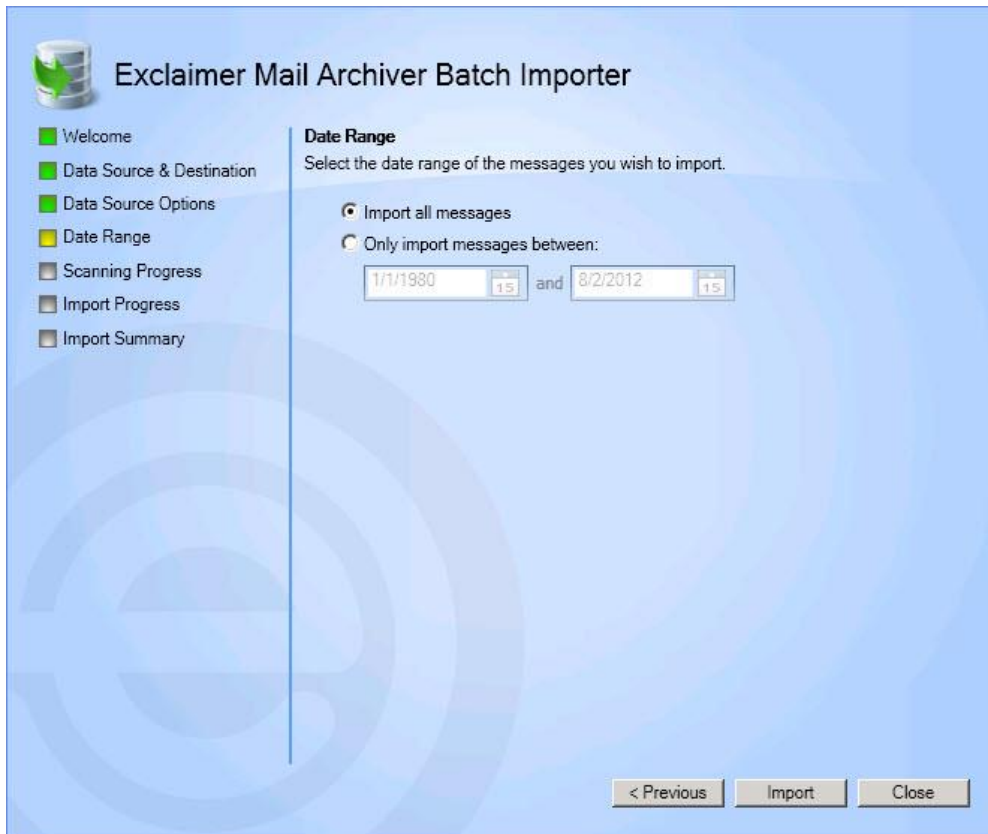
- Select the check box associated with any folder(s) that you wish to import.

When navigating the folder structure, folders may be associated with a 'down arrow' icon, as well as a check box. This happens when a folder contains sub folders and, when the arrow is selected, options are displayed in a pop-up menu, so you can choose what action to take when selecting the folder. This is shown in the example below:



Simply click the required action from the pop-up menu to make a selection.

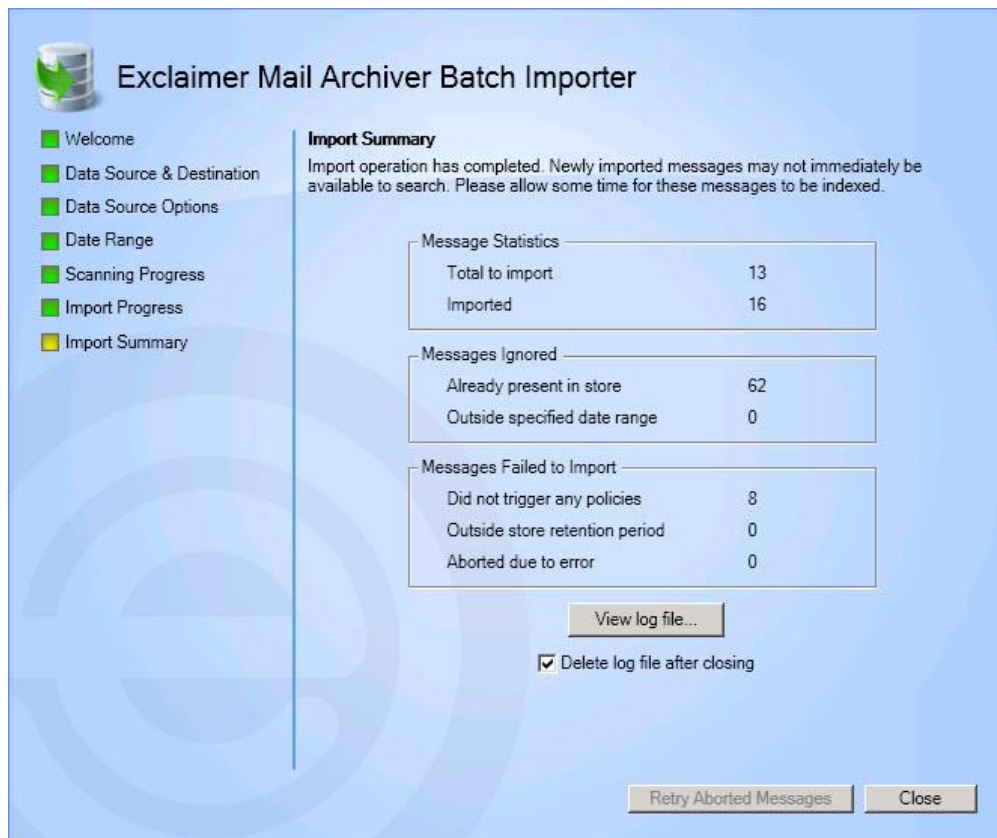
6. Click [next](#) to access [date range](#) options. Here, you can choose to [import all messages](#) or only those messages which fall within specified start/end dates:



The screenshot shows the 'Exclaimer Mail Archiver Batch Importer' window. On the left is a vertical navigation pane with seven steps: 'Welcome', 'Data Source & Destination', 'Data Source Options', 'Date Range' (highlighted with a yellow square), 'Scanning Progress', 'Import Progress', and 'Import Summary'. The main area is titled 'Date Range' and contains the instruction 'Select the date range of the messages you wish to import.' There are two radio button options: 'Import all messages' (which is selected) and 'Only import messages between:'. Below the second option are two date pickers; the first is set to '1/1/1980' and the second to '8/2/2012', with a small '15' in a box next to each. At the bottom right of the window are three buttons: '< Previous', 'Import', and 'Close'.

7. Having set required date range options, click [import](#) to start the import process. During processing, [archiving policies](#) [pg.61] are applied and messages are archived to the appropriate [archive store](#) [pg.110]. If no policies apply for a message, the message is not imported - see [what happens if a legacy email cannot be archived?](#) [pg.136] for further information.

- Once the import is complete, an import summary is displayed:



Here, you can see the total number of imported messages, together with the number of messages which were ignored and the number of messages which failed to import because no [policies](#) [pg.61] were triggered, because they exceed the [retention period](#) [pg.119] that has been set for the relevant [archive store](#) or because they were aborted due to an error (see page 156 for details about [handling aborted messages](#)).

- From here, you can view a detailed import log by selecting the [view log](#) button. Alternatively, you can use the [retry aborted messages](#) button to try to import problem messages again.
- Click [close](#) to exit from the [Exclaimer Mail Archiver batch importer](#).

NOTE

If the **delete log** check box is selected, the import log will be removed. If this option is de-selected, the log will be retained in the **ProgramData\Exclaimer Ltd\Mail Archiver\Import** folder. If you need to contact support regarding a problem with the batch importer they will require this log file.

Handling Aborted Messages

When a batch import is completed, a summary page is displayed at the end of the import process. This summary shows the total number of imported messages, together with:

- The number of messages which failed to import because no [policies](#) were triggered [\[pg.61\]](#).
- The number of messages which were not imported because they exceed the [retention period](#) that has been set for the relevant [archive store](#) [\[pg.119\]](#).
- The number of messages that were aborted due to an error (see below).

Sometimes, particularly when [importing a PST file](#) (see page 143), messages can be aborted because the sender/recipient address cannot be found. To help manage these cases, a list of missing addresses is created in a file named [SMTPCache.txt](#). For example, if the PST file was generated from an old version of Microsoft Exchange, a missing address example may read:

```
/O=EXCLAIMER/OU=FIRST ADMINISTRATIVE GROUP/CN=RECIPIENTS/CN=ALEX
```

A user can access the [SMTPCache.txt](#) file, enter any email addresses to be used and then chose to [retry aborted messages](#) from the batch importer.

Taking the example above, the [SMTPCache.txt](#) file would contain:

```
/O=EXCLAIMER/OU=FIRST ADMINISTRATIVE GROUP/CN=RECIPIENTS/CN=ALEX|<replace  
with smtp address>|REPLACE WITH DISPLAY NAME|/O=EXCLAIMER/OU=FIRST  
ADMINISTRATIVE GROUP/CN=RECIPIENTS/CN=ALEX
```

The user can then edit the file with the correct information:

```
/O=EXCLAIMER/OU=FIRST ADMINISTRATIVE  
GROUP/CN=RECIPIENTS/CN=ALEX|alex@exclaimer.com|Alex  
Smith|/O=EXCLAIMER/OU=FIRST ADMINISTRATIVE GROUP/CN=RECIPIENTS/CN=ALEX
```

When the [retry aborted messages](#) option is selected, the [SMTPCache.txt](#) file is read and missing email addresses are matched. Taking the example above, the message would be imported with the sender shown as [Alex](#) with the email address alex@exclaimer.com.

Chapter 7

Index Maintenance

Introduction

Each [store](#) is associated with its own search [index](#) - when a new [store](#) is added, its [index](#) is automatically created in the same location.

Having a separate [index](#) for each [store](#) ensures that Exclaimer Mail Archiver [search features](#) [pg.177] are fully optimized; it also allows system administrators to control the [frequency with which each index is updated](#) [pg.116] and to perform [maintenance tasks](#) [pg.162] quickly and easily.

All work with [indexes](#) is completed from the [index maintenance](#) branch of the console tree:



When this branch is selected, all indexes (i.e. one index for each configured [store](#)) are displayed in the [settings tab](#) [pg.160]. From here you can:

- View the current [status and settings](#) for a selected index [pg.160]
- [Force an immediate update](#) for an index [pg.163]
- Add a [single maintenance task](#) for immediate action [pg.164]
- Add [multiple maintenance tasks](#) to a maintenance queue [pg.166]

Indexes cannot be removed however, if required, you can:

- Disable searching for a particular [store](#) using the [available to search](#) check box option on the [availability settings](#) [pg.119] tab for the [store](#)
- [Change the location of the index](#) [pg.168] using the [change location](#) option on the [data tab](#) for the [store](#) [pg.116]

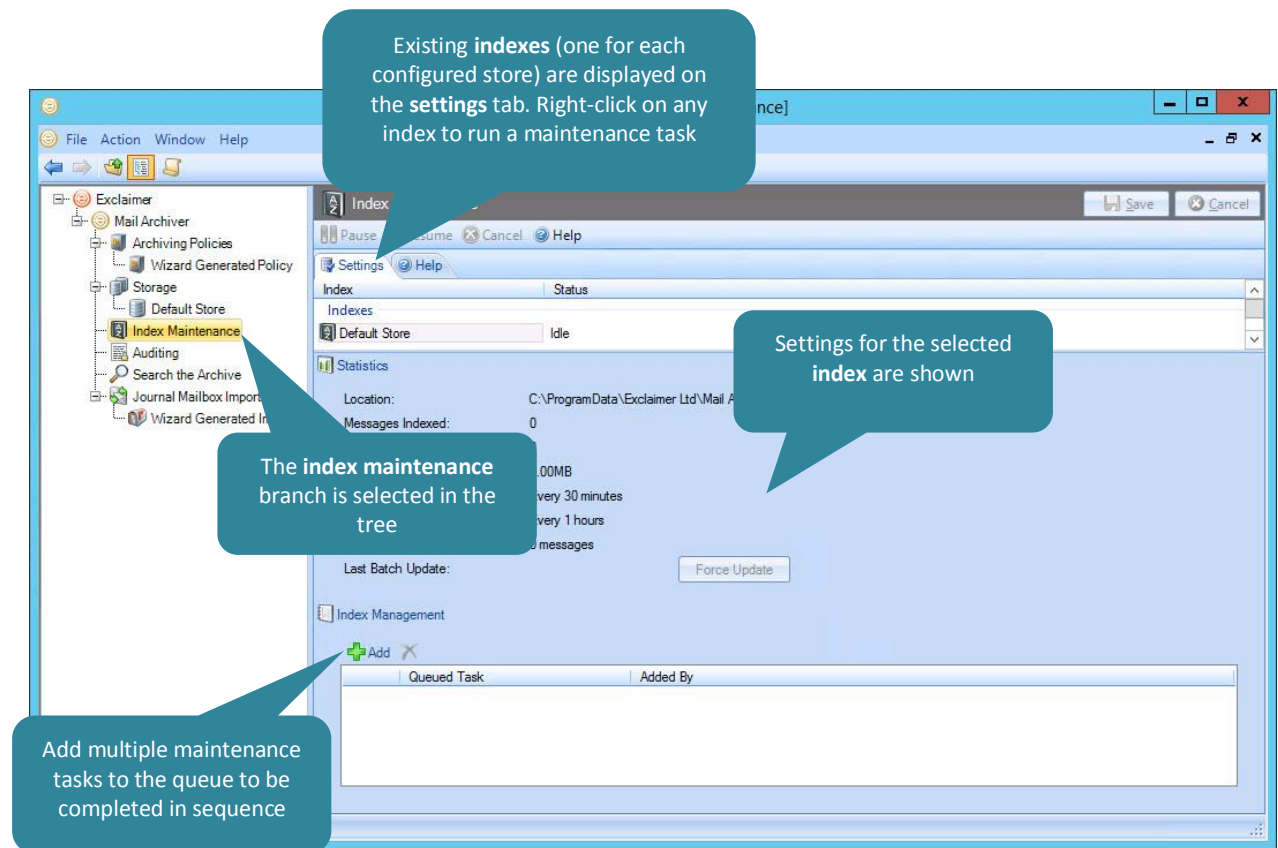
Messages are added almost immediately to the [store](#) by the [journal mailbox importer](#) (or by using the [batch importer](#) utility [pg.135]). However messages do not appear in users' search results until they are indexed. Index maintenance options allow you to configure how frequently to index your messages for optimal performance whilst ensuring timely updates of users messages to allow them to be found in searches.

Accessing Existing Indexes

Within **Exclaimer Mail Archiver**, **indexes** are accessed via the **index maintenance** branch of the **console tree** [pg.31]:

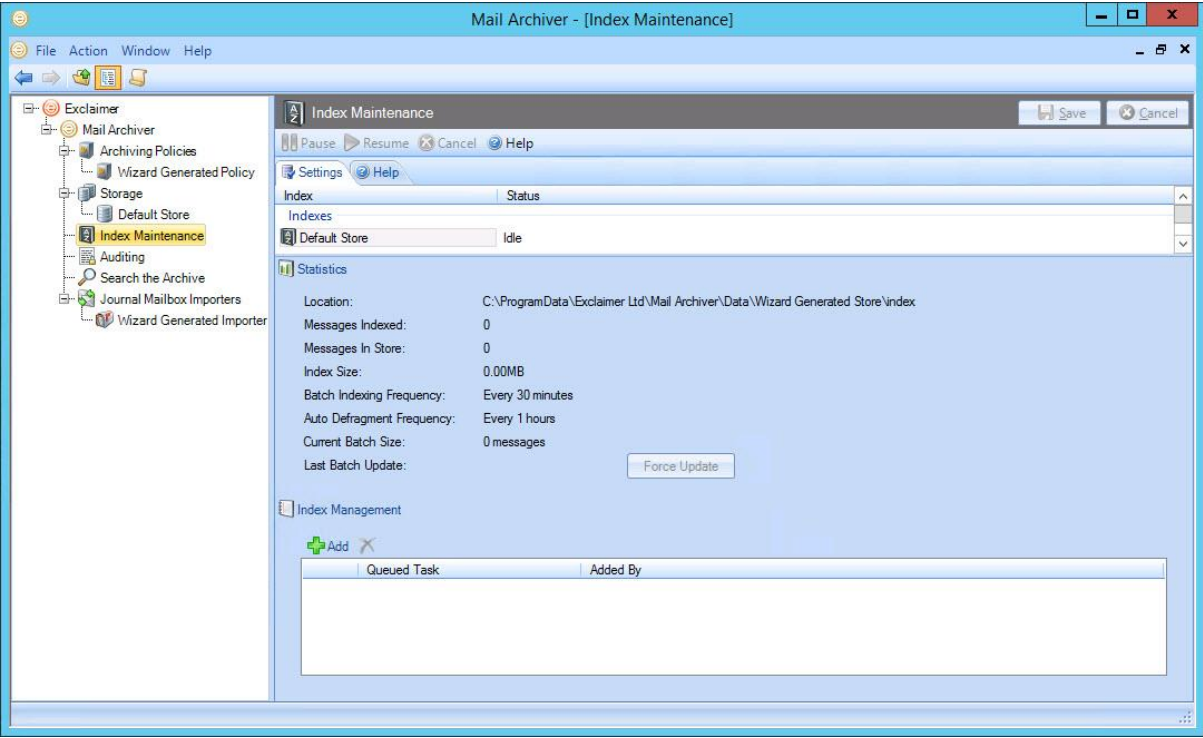


When the **index maintenance** branch is selected, all existing **indexes** are displayed in the **settings** tab:



Index Settings

When an [index](#) is selected from the [settings](#) tab, summary information is displayed in the [statistics](#) section (below the list of [indexes](#)):



Statistics for each index are summarized below:

Item	Summary
Location	The current location of the index . When an index is created, it is automatically created in the same location as its associated store . Each index can be maintained in the same location as its associated store however it can be moved if required [pg.168] .
Messages Indexed	Shows the number of messages in the store which have been indexed, ready for searching.
Messages in Store	Shows the number of messages in the store - this is the total number of messages - i.e. messages that have been indexed and messages which are not yet indexed.

.../continued

Item	Summary
Index Size	Shows the physical file size of the index file. Note that file types associated with each index are .ix , .dat , .tmp and .log . For further information please refer to the moving an existing index section on page 168.
Batch Indexing Frequency	If a store contains 5000 messages or fewer, the system forces an index update automatically every two seconds (because there are relatively few messages, this has no impact upon performance). Once a store exceeds 5000 messages, the frequency with which an index is updated is determined via data settings [pg.116] for the associated store.
Auto Defragment Frequency	Over time, the search index for a store may become fragmented and so less efficient. Using data settings [pg.116] for the associated store, you can specify the frequency with which the index is automatically defragmented (or you can choose to never run the defragmentation process).
Current Batch Size	Shows the number of messages which are waiting to be indexed.
Last Batch Update	Shows when the index was last updated.

Using options on this tab you can:

- [Force an immediate update](#) for an index [\[pg.163\]](#)
- Add a [single maintenance task](#) for immediate action [\[pg.164\]](#)
- Add [multiple maintenance tasks](#) to a maintenance queue [\[pg.166\]](#)

Indexes cannot be removed however, if required, you can:

- Disable searching for a particular [store](#) using the [available to search](#) check box option on the [availability settings \[pg.119\]](#) tab for the [store](#)
- [Change the location of the index \[pg.168\]](#) using the [change location](#) option on the [data tab](#) for the [store \[pg.116\]](#)

Working with Indexes

Having accessed the [index maintenance settings tab](#) [pg.160], all available indexes are displayed. Having selected an index, you can:

- [Force an immediate update](#) for an index [pg.163]
- Add a [single maintenance task](#) for immediate action [pg.164]
- Add [multiple maintenance tasks](#) to a maintenance queue [pg.166]

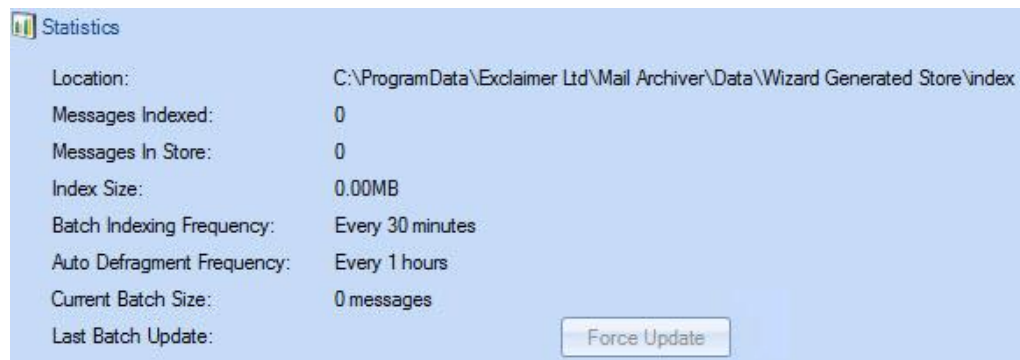
Forcing an Update

If the selected [store](#) contains messages which have not been indexed, the [force update](#) option can be used to perform an immediate update.

If a [store](#) contains 5000 messages or fewer, the system forces an [index](#) update automatically every two seconds (because there are relatively few messages, this has no impact upon performance), therefore it is unlikely that you would need to force an update manually for smaller [stores](#).

However, once a [store](#) exceeds 5000 messages, the frequency with which its [index](#) is updated is determined via [data settings \[pg.116\]](#) for the associated [store](#). If you need to update an index before its next automatic update is scheduled, the [force update](#) option can be used – for example, if you have [imported a batch of legacy emails \[pg.135\]](#), you may wish to update search indexes immediately.

To do this, select the required [store](#) and click the [force update](#) button in the [statistics](#) pane:



Note that the [force update](#) button is only 'active' if the selected store contains messages which need to be indexed.

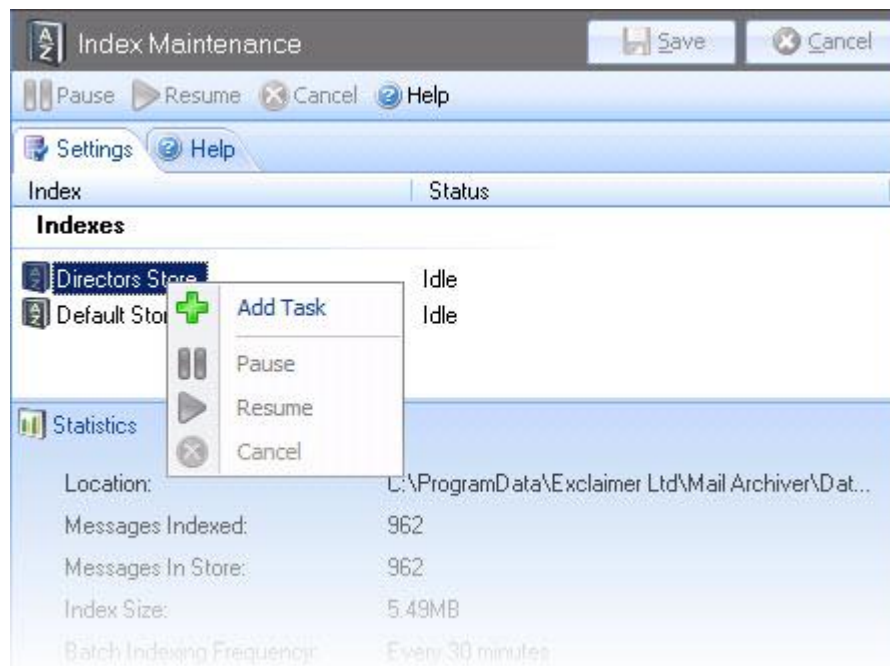
Adding a Maintenance Task for Immediate Action

The following maintenance tasks are available for indexes:

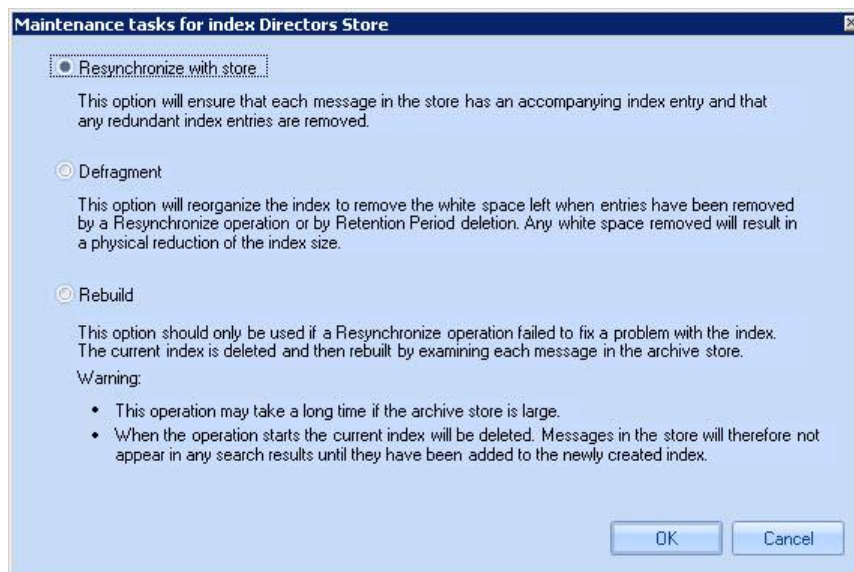
Maintenance Task	Summary
Resynchronize with store	Use this option to keep the index and its associated store in sync - i.e. to ensure that each message in the store has an accompanying index entry and that any redundant index entries are removed.
Defragment	Use this option to reorganize the index to remove any 'white space' left when entries have been removed by a resynchronize operation or by retention period [pg.119] deletions. Removing 'white space' results in a physical reduction in the index size which, in turn, subtly increases index performance.
Rebuild	This task completely deletes and rebuilds the existing index by examining each message in the archive store . A rebuild operation can take a long time for larger stores and any searches completed during this time will not be reliable. As such, the rebuild option should be used with care - typically a rebuild would only be required if there is a problem with a resynchronize operation.

To perform one of these tasks for an [index](#), follow the steps below:

1. Select the required [index](#) from the list and right-click to display available options:



2. Select the [add task](#) option to view available tasks:



3. Choose the required task and click [OK](#) to perform the operation.

NOTE

If you wish to run more than one task for an index you should add required tasks to a queue - see [Adding Multiple Tasks to the Maintenance Queue](#) on the following page.

Adding Multiple Tasks to the Maintenance Queue

If you need to run more than one [maintenance task \[pg.164\]](#) for an [index](#), you can add required tasks to a queue so that they will run one after the other (rather than selecting a [single task \[pg.164\]](#), waiting for it to complete and then selecting another one).

To do this, follow the steps below:

1. Select the required [index](#) from the list.
2. Click the [add](#) option in the [index management](#) pane (at the bottom of the [settings](#) tab):



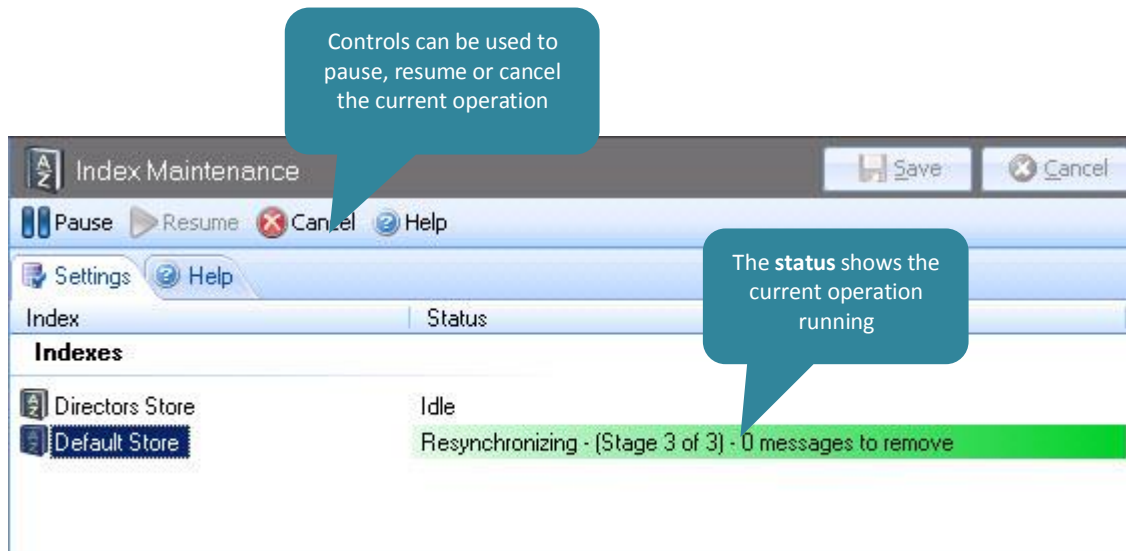
Available tasks are displayed:



3. Choose the required task and click [OK](#) to add it to the queue. If there are no tasks currently running, this task will start immediately, otherwise it will be queued for completion when possible.

Task Controls

When a maintenance task is running, controls are available at the top of the settings tab (and also if you right-click the appropriate store) to [pause](#), [resume](#) or [cancel](#) the current operation:



Moving an Existing Index

The location of a store's [index](#) is defined in the [search index](#) section of the [data](#) [pg.116] tab for the [store](#):

The screenshot shows the 'Default Store' configuration window with the 'Data' tab selected. The 'Store Data' section shows the location as 'C:\ProgramData\Exclaimer Ltd\Mail Archiver\Data\Wizard Generated Store' with a 'Change location...' button. Below it, there are fields for 'User Name' and 'Password' with checkboxes for 'This location requires credentials'. The 'Search Index' section shows the location as 'The Index files are currently located in the same folder as the Store Data' with a 'Change location...' button. Below this, there are settings for 'Update Index' (Every: 30 Minutes, Daily at: 23:59, Force an update when 500 messages are queued for indexing) and 'Defragment index' (Every: 1 Hours, Daily at: 23:59).

When a [store](#) is [added](#) [pg.125], an associated [search index](#) is automatically created in the same location as the [store](#). However, if required (for example – if the index is very large and disk space is an issue), use the [change location](#) button to specify an alternative location for the [index](#).

This may be for performance reasons – for example you choose to hold [store](#) data on a network drive however for faster searches, the [index](#) files are stored on the [Mail Archiver](#) server's internal hard drive.

Before moving an index, a number of preparatory steps must be completed. These steps are detailed on the following page.

Required Sequence for Moving an Index

To change the [location](#) of an index, the following tasks should be completed in the sequence listed here:

1. Ensure that all users are logged out from the [search console](#) [pg.177].
2. Disable [journal mailbox importing](#) from the [settings tab on the mail archiver branch of the console tree](#) [pg.45].
3. To maintain the existing index, copy the existing index files to the new location. By default, the index is found in the [index](#) sub-folder of the store location. Each index is associated with the following files: [.ix](#), [.dat](#), [.tmp](#) and [.log](#). If existing index files are not copied, the entire index will be rebuilt when the location is changed and saved.
4. Change the [location](#) for the index on the [data tab for the store](#) [pg.116]. If no index files are found in the new location, the index will be rebuilt automatically when the location is changed and saved.
5. Re-enable [journal mailbox importing](#) form the [settings tab on the mail archiver branch of the console tree](#) [pg.45].
6. Save all changes.
7. Remove the original [index](#) files.

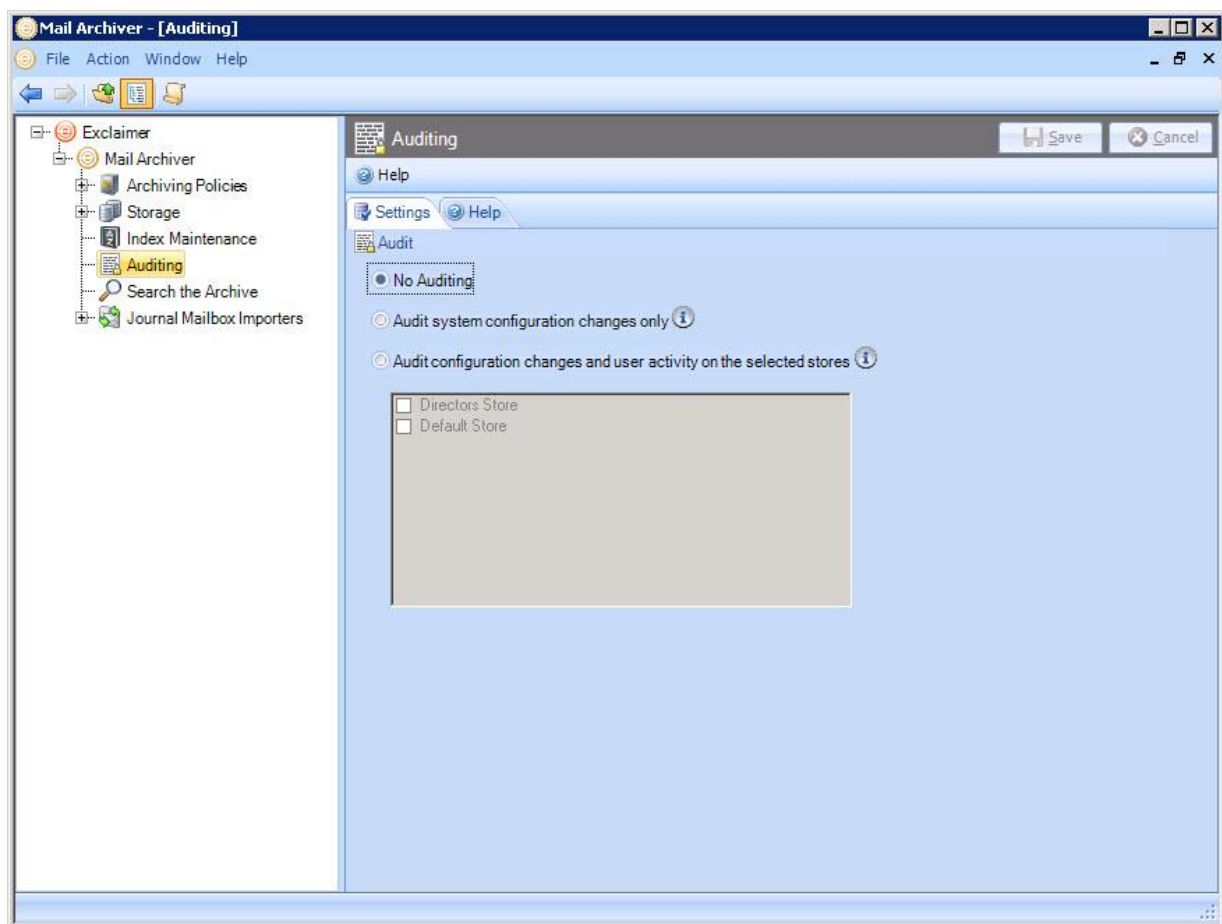
Chapter 8

Auditing

Introduction

To ensure compliance with archiving regulations, it is important to know if users are tampering with any defined [archive stores](#) [pg.110]. For example, although messages cannot be deleted from a [store](#) directly, it is possible that a user could surreptitiously disable archiving for a period of time, send an offensive message and then enable archiving once again. It also allows you, as an [Administrator](#), to ensure that users are not abusing their security privileges as each search of the archive can also generate an audit event, including the phrase a user searched for and the messages they viewed.

The [auditing](#) feature records every configuration change (including [settings](#) [pg.45], [policies](#) [pg.61], [stores](#) [pg.110] and [journal mailbox importers](#) [pg.220]) together with user [searches](#) [pg.177] and [message previews](#) [pg.193]. Auditing options are displayed when the [auditing](#) branch is selected in the [console tree](#) [pg.31]:



Audit information is recorded in the [event log \[pg.175\]](#) on the server and three levels of audit are available:

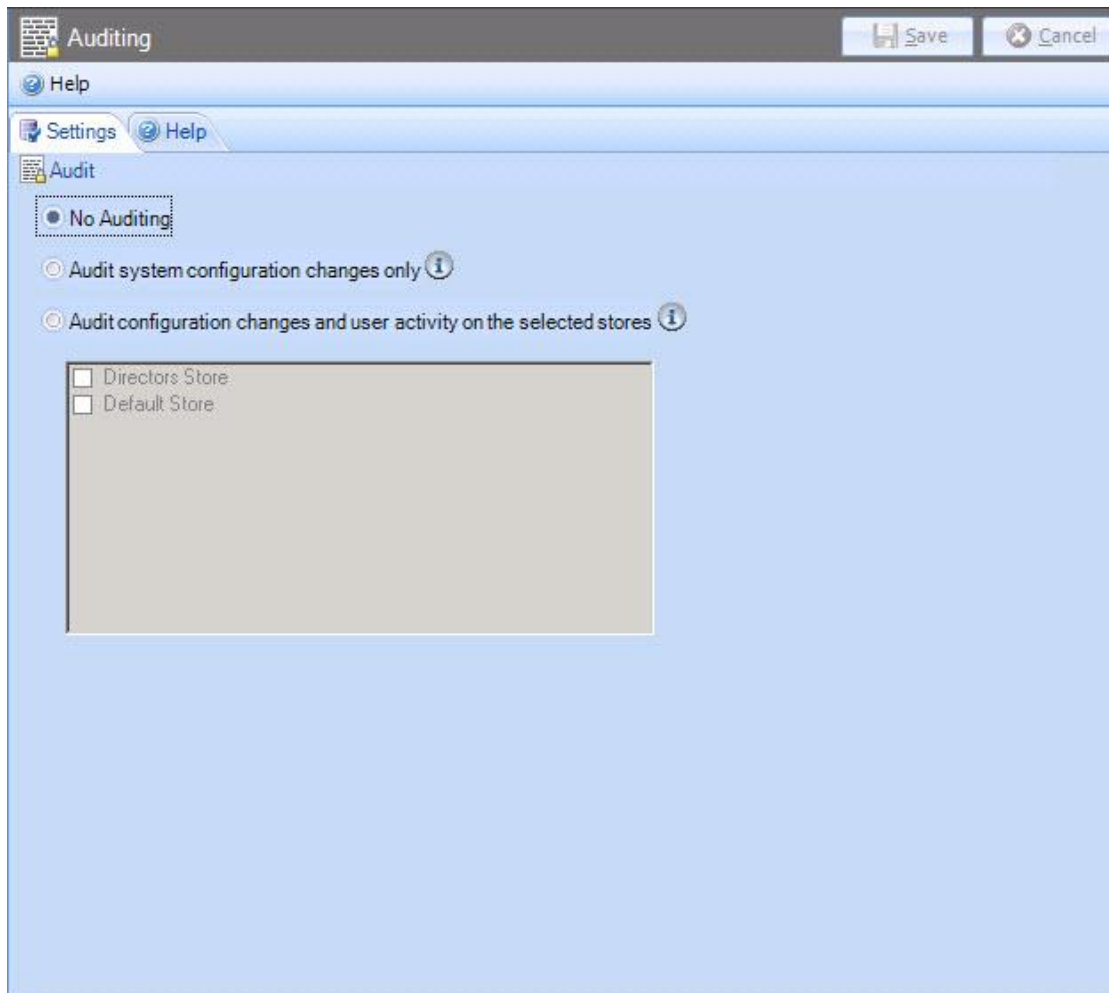
- [No auditing \[pg.174\]](#)
- [Audit system changes only \[pg.174\]](#)
- [Audit configuration changes and user activity on selected stores \[pg.174\]](#)

NOTE

Events are also logged if the **auditing** feature is disabled or enabled, so it is not possible to disable the audit without trace.

Audit Settings

[Auditing](#) options are available from the [settings](#) tab when the [auditing](#) branch is selected in the [console tree](#) [pg.31]:



Three levels of audit are available:

- [No auditing](#) [pg.174]
- [Audit system changes only](#) [pg.174]
- [Audit configuration changes and user activity on selected stores](#) [pg.174]

Simply select the required option and save changes using the [save](#) option at the top of the window.

NOTE

Enabling/disabling or making any changes to the **auditing** feature also logs an audit entry, so it is not possible to change or disable the audit without trace.

No Auditing

When the [no auditing option](#) is selected, any configuration changes or actions taken by users will not be recorded in the [event log](#).

Audit System Changes Only

When the [audit system changes only](#) option is selected, any changes made within the [Mail Archiver](#) branch of the [console tree](#) [pg.31] will be recorded - i.e. alterations to [Exclaimer Mail Archiver settings](#) [pg.45], [policies](#) [pg.61], [stores](#) [pg.110] or [journal mailbox importers](#) [pg.220].

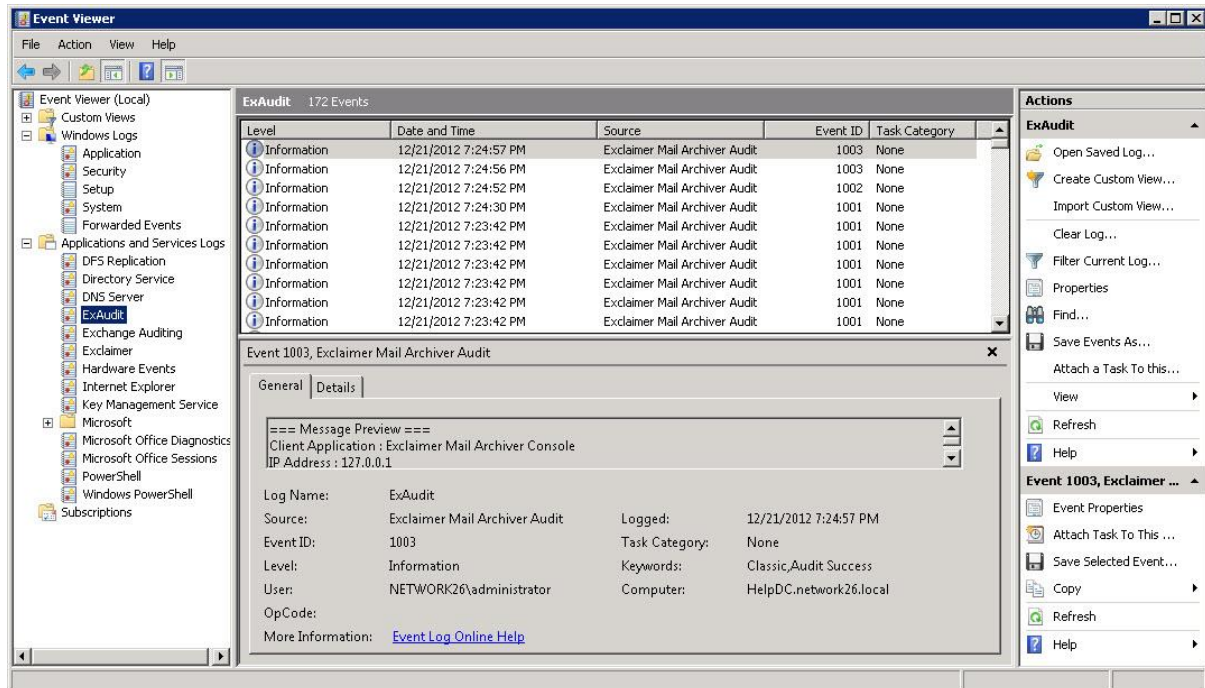
Audit Configuration Changes and User Activity on Selected Stores

When the [audit configuration changes and user activity on selected stores](#) is selected, any changes made within the [Mail Archiver](#) branch of the [console tree](#) [pg.31] together with user [searches](#) [pg.177], [message previews](#) [pg.193], [message forwarding](#) [pg.34] and [message restoration](#) [pg.201] are recorded.

All defined stores are listed and can be selected for audit using associated check boxes.

Viewing Audit Information

Audit information is written to the [Windows Event Log](#) - for example:



To access the [Windows event log](#):

1. On the appropriate server, click [start](#).
2. Select [administrative tools](#).
3. Select [event viewer](#).
4. Navigate to the [applications and service logs](#) branch.
5. Select [ExAudit](#).

Audit events are categorized as:

Category	Generated From	See Page
Exclaimer Mail Archiver Console	Any changes made within the Mail Archiver branch of the console tree	31
Rich Web Search	Rich, web-based searches	208
Console Search	Searches completed within the Exclaimer console	177
Lightweight Web Search	Lightweight, web-based searches	212

Chapter 9

Search

Introduction

Traditional email storage is based upon a hierarchical structure utilizing tags and categories, which can be an unreliable and inefficient approach. [Exclaimer Mail Archiver](#) incorporates Web technology which archives messages in a flat structure, designed for maximum speed and reliability. Coupled with a powerful and innovative search engine (with separate [search indexes](#) [pg.157] for each [store](#) for added flexibility), you can be confident that an archived message is never more than a few seconds away.

[Exclaimer Mail Archiver](#) provides two search facilities:

- [Console search](#) - administrators can search mail archives from within the [Exclaimer console](#)
- [Web search](#) - users can search mail archives from a desktop computer or a web-enabled mobile device

Console Search

The [console search](#) facility provides straightforward, intuitive options to [build complex queries](#) [pg.182] based upon a wide range of conditions and [date range](#) [pg.186] criteria. Having performed a search from within the [Exclaimer console](#), any messages that match specified criteria are displayed in the [search results pane](#). Users will only see results for messages which they have [access permissions](#) [pg.187] to view. From here, you can:

- Use the [refine search pane](#) [pg.189] to apply additional search filters to 'drill down' further, based upon common characteristics identified within existing search results.
- Sort the list of results using [search pane column headings](#) [pg.191].
- View [message content](#) [pg.195], [properties](#) [pg.196] and [attachments](#) [pg.200] in the [message pane](#) [pg.192].
- Double-click an entry to [view the message in a new window](#) [pg.193] ([message content](#) [pg.195], [properties](#) [pg.196], together with a [forwarding](#) [pg.203] option can be viewed).
- [Select messages](#) [pg.191] to be [restored](#) [pg.201] to a mailbox.

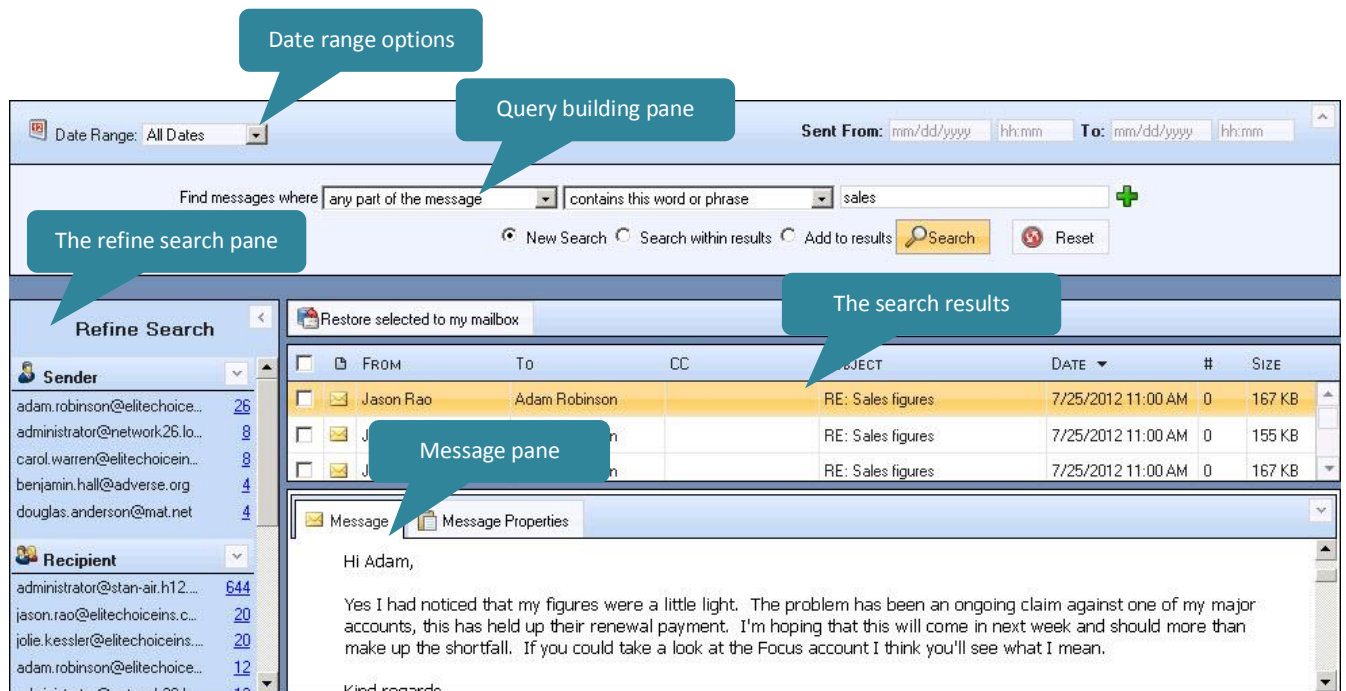
Web Search

The [web search](#) facility allows users to access mail archives from a browser on a desktop PC but also from a Blackberry, iPhone, Android or any web-enabled mobile device. Users have the choice of working with a [rich user interface](#) [pg.208] which has the same look, feel and functionality of the [console search](#) and is ideal when working on a desktop PC, or of using a [lightweight](#) [pg.212] version (with pared down functionality) when working with a mobile device.

For further information please refer to the [web search](#) [pg.205] section of this guide.

Understanding the Search Window

When the [search the archive](#) branch is selected in the console tree, the [search](#) window is displayed, as shown below:

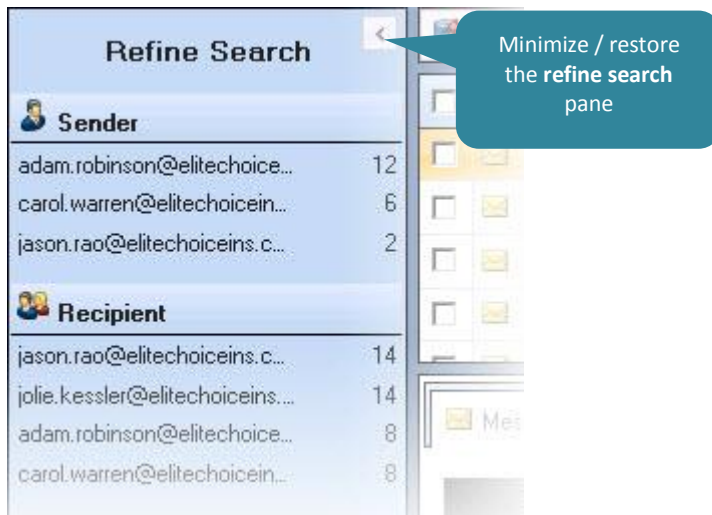


Broadly, the search window is split into five panes:

- The [date range pane](#) [pg.186] - used to search for messages sent/received within a given time period.
- The [query building pane](#) [pg.182] - used to define criteria upon which the search is based.
- The [search results pane](#) [pg.188] - displays all search results and options (messages can be [viewed](#) [pg.193] and [forwarded](#) [pg.203] or [selected](#) [pg.191] to be [restored](#) [pg.201] to a mailbox).
- The [refine search pane](#) [pg.189] - used to quickly filter the list of search results, based upon the most common characteristics of messages found.
- The [message pane](#) [pg.192] - quickly view [message content](#) [pg.195] or [message properties](#) [pg.196] and [message attachments](#) [pg.200].

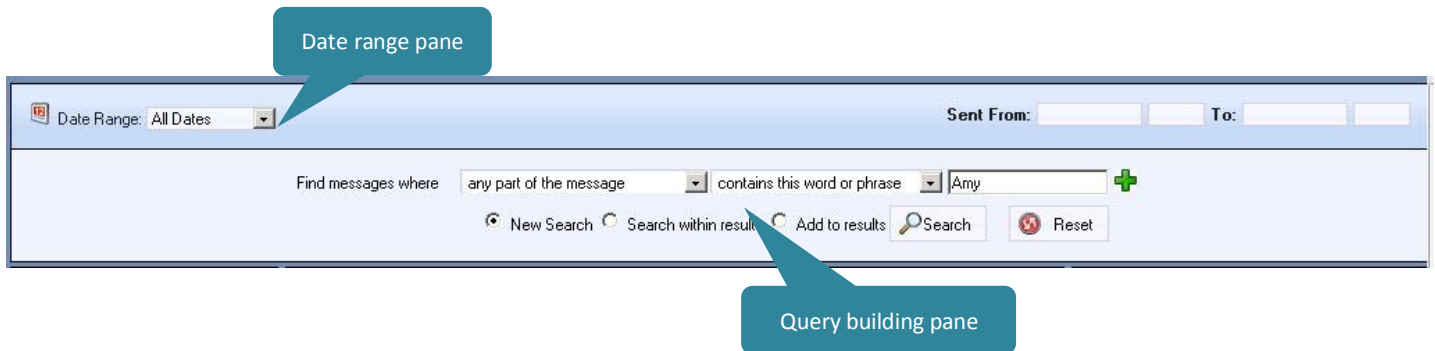
Managing Search Window Panes

The [search](#) window requires a large amount of screen space. As such, the [actions pane](#) [pg.36] is not accessible when the [search](#) window is in use. The console tree can be displayed but you may prefer to [hide the tree](#) [pg.34] to allow extra space for searching. Also note that elements of the [search](#) window can be minimized and restored when required. If a [search](#) pane can be minimized in this way, an arrow is displayed - for example:



Defining a Search

Searches are defined using options in the [date range](#) pane and the [query building pane](#) within the [search window](#) [pg.179]:



Using [date range](#) [pg.186] options, a predefined time period (for example, [last 30 days](#)) can be selected, or [custom](#) dates can be entered. Detailed search criteria (for example, keywords and phrases) are entered using [query options](#) [pg.182] in the lower pane. Having performed a search, [search results](#) [pg.187] are listed in the search results pane, below the [query building pane](#).

Building Search Queries

Search criteria are entered using query options:

The screenshot shows the search query builder interface. It includes a text input field with the value 'Amy' and a green plus icon to its right. Below this are radio buttons for 'New Search' (selected), 'Search within results', and 'Add to results', followed by 'Search' and 'Reset' buttons. Three callout boxes are present: 'Specify search criteria' points to the first dropdown menu; 'Supplementary search options' points to the radio buttons; and 'Use the + option to add additional criteria (i.e. build a query)' points to the green plus icon.

Three fields are used to define a query. The first field is used to select the basis of the query - i.e. to choose which part of the message (or details about the message/store) should be used for matching:

This screenshot shows the first dropdown menu open, displaying a list of search criteria: '[select field]', 'any part of the message' (highlighted), 'the subject', 'the sender', 'any of the recipients', 'none of the recipients', 'an attachment', 'the number of attachments', 'none of the attachments', 'conversation is between', 'the size (in KB)', 'the store name', and 'the conversation topic'. The rest of the interface is the same as the previous screenshot.

Searches can be based upon a wide range of criteria, including different parts of a message, conversations between given parties, a particular store name, etc. For a full summary, please refer to the [search criteria summary \[pg.183\]](#).

NOTE

If more than one archive store has been defined, all stores (to which you have access permissions) will be searched unless you specify criteria for a particular **store name**.

The second field is used to select a condition for the query. Available conditions vary according to which selection was made for the basis of the query. For example, if searching for particular words in [any part of the message](#), available conditions allow you to choose whether an occurrence of [any](#) of the specified words should be matched, or if [all](#) words must be present to produce a match.

This screenshot shows the second dropdown menu open, displaying a list of search conditions: 'contains this word or phrase' (highlighted), 'contains any of these words', and 'contains all of these words'. The rest of the interface is the same as the previous screenshot.

The third field is used to specify the required value to be matched. This field is not case sensitive.


Search Criteria Summary

A summary of conditions for each search element is listed below:

Option	Conditions Summary
Any part of the message	Search for messages where specified words or phrases are matched anywhere in the message.
The subject	Search for messages where specified words or phrases are matched in the message subject line.
The sender	Search for messages where the sender: <ul style="list-style-type: none"> • Email address or name contains • Is a member of this group • Is not a member of this group • Email address is • Email address is not • Email address starts with
Any of the recipients	Search for messages where any of the recipients: <ul style="list-style-type: none"> • Is a member of a specified group • Is not a member of a specified group • Has a specified email address • Has an email address that starts with specified characters • Has a name or email address which contains specified characters
None of the recipients	Search for messages where none of the recipients: <ul style="list-style-type: none"> • Is a member of a specified group • Has a specified email address • Has an email address that starts with specified characters • Has a name or email address which contains specified characters
An attachment	Search for messages where an attachment name contains a specified word or phrase.
The number of attachments	Search for messages where the number of attachments: <ul style="list-style-type: none"> • Is equal to a specified number • Is greater than a specified number • Is between two specified numbers
None of the attachments	Search for messages which have at least one attachment but none of the attachments has a name which contains a specified word or phrase.
Conversation is	Search for messages where the conversation is between:

Option	Conditions Summary
between	Specify two parties between which emails are sent. Typing in these fields will prompt suggestions from the Active Directory. If required, an email address can be specified
The size	Search for messages where the size of the email (in KB): Is between two specified numbers
The store name	Search for messages in a particular store where the store name: <ul style="list-style-type: none"> Is the selected store Is not the selected store If a particular store is not specified within search criteria, all defined stores [pg.110] will be searched.
The conversation topic	Search for messages where the conversation topic: <ul style="list-style-type: none"> Contains this word or phrase Is Is blank


Adding to a Query

Search queries can be as simple or as complex as required. Use the  icon to add further rows for additional criteria:

Find messages where

the store name	is	Default Store
and the subject	contains this word or phrase	confidential
and conversation is between	john smith	and joe bloggs

When multiple criteria lines are used, messages must match ALL lines in order to be returned as a search result. If required, a line can be removed by clicking the associated  symbol.

NOTE

To match ANY line, use the **add to results** option, shown on page 185.

Supplementary Options

Having performed a search and [displayed results](#) [pg.187], options beneath criteria lines can be used to continue:



From here:

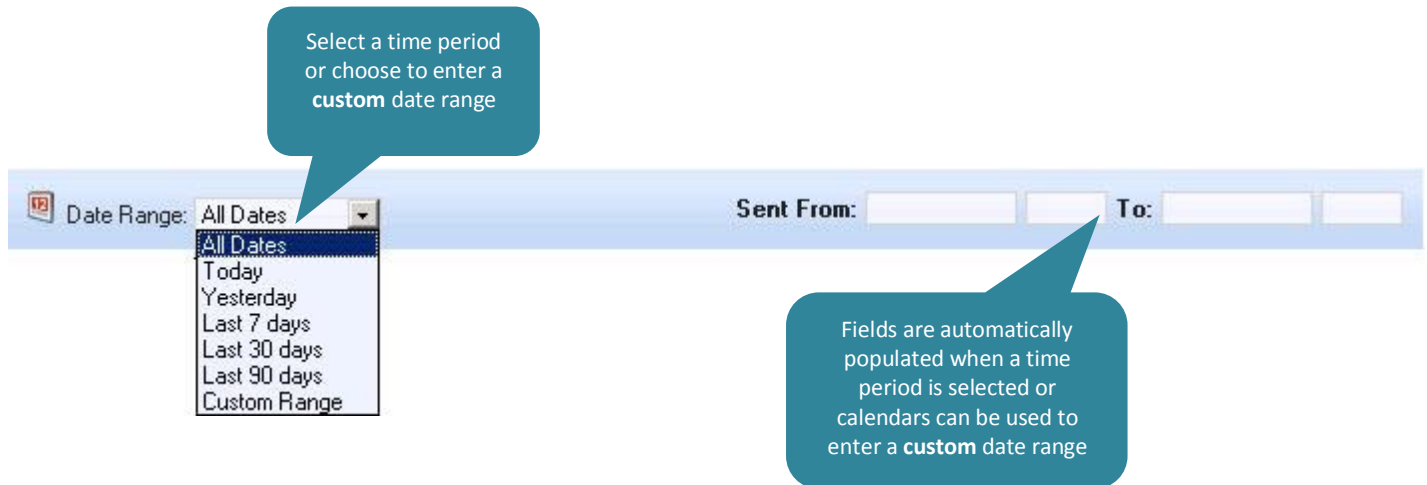
- Select [new search](#) and click the [search](#) button to clear any existing results and perform a new search based upon specified criteria
- Select [search within results](#) and click the [search](#) button to perform a search only within the existing results, based upon new criteria
- Select [add to results](#) and click the [search](#) button to perform a search based upon new criteria and add any results to those already listed
- Click the [reset](#) button to clear all specified search criteria

NOTE

The [refine search pane](#) [pg.189] can also be used to quickly filter the search results list. When a **refine** option is used, the search query fields automatically update to reflect the change.

Date Range Options

Date range options are set at the very top of the [search window](#) [pg.179]. Once defined, any subsequent query that is built will only consider messages within the specified period:



Use the drop-down list associated with the [date range](#) field to select a predefined time period. When a time period is selected, associated [sent from](#) / [to](#) dates are automatically populated with applicable dates:



Alternatively, select [custom range](#) from the list and use calendars associated with the [sent from](#) / [to](#) fields to enter a more specific time period:



Working with Search Results

Having performed a search, any messages that match [specified criteria](#) [pg.182] (including [date range options](#) [pg.186]) are displayed in the [search results pane](#). From here, you can:

- Use the [refine search pane](#) [pg.189] to apply additional search filters to 'drill down' further, based upon common characteristics identified within existing search results.
- Sort the list of results using [search pane column headings](#) [pg.191].
- View [message content](#) [pg.195], [properties](#) [pg.196] and [attachments](#) [pg.200] in the [message pane](#) [pg.192].
- Double-click an entry to [view the message in a new window](#) [pg.193] ([message content](#) [pg.195], [properties](#) [pg.196] and [attachments](#) [pg.200], together with a [forwarding](#) [pg.203] option can be viewed).
- [Select messages](#) [pg.191] to be [restored](#) [pg.201] to a mailbox.

Security Restrictions

When [archive stores are defined](#) [pg.125], [security permissions](#) are configured to determine which users can access messages in that [store](#) when using search facilities and, if granted, what level of access those users have. For example, users might have access to all messages in the [store](#), just their own messages in the [store](#), all messages for a specified [Active Directory](#) group, etc. For further information please refer to the [store security](#) [pg.121] section.

When a search is performed, a user will only see results which they have access permissions to view. Typically, most users will at least have access to their own messages - i.e. messages that they sent or received (either directly or by being copied in). However, an additional level of checking is also performed to determine what [message properties](#) [pg.196] can be viewed when a user [accesses a message from a list of search results](#) [pg.193].

Understanding the Search Results Window

Having performed a search, any messages that match [specified criteria](#) [pg.182] (including [date range options](#) [pg.186]) are displayed in the [search results pane](#). From here, you can:

- Use the [refine search pane](#) [pg.189] to apply additional search filters to 'drill down' further, based upon common characteristics identified within existing search results.
- Sort the list of results using [search pane column headings](#) [pg.191].
- [Select messages](#) [pg.191] to be [restored](#) [pg.201] to a mailbox.
- View [message content](#) [pg.195], [properties](#) [pg.196] and [attachments](#) [pg.200] in the [message pane](#) [pg.192].
- Double-click an entry to [view the message in a new window](#) [pg.193] ([message content](#) [pg.195], [properties](#) [pg.196] and [attachments](#) [pg.200] together with a [forwarding](#) [pg.203] option can be viewed).

The screenshot shows the search results interface with several callouts:

- Date range options:** Points to the 'Date Range: All Dates' dropdown.
- Query building pane:** Points to the search criteria area with 'Find messages where' and 'any part of the message'.
- Restore selected message(s) option:** Points to the 'Restore selected to my mailbox' button.
- Message properties:** Points to the 'Message Properties' tab in the message pane.
- Message content:** Points to the message body text.
- Use the refine search pane to quickly filter search results:** Points to the 'Refine Search' pane on the left.
- Double-click any message to view in a separate window and access further options:** Points to a message entry in the results list.
- The search results list - click a heading to sort search results in that sequence:** Points to the column headers (FROM, To, CC, SUBJECT, DATE, #, SIZE).

FROM	To	CC	SUBJECT	DATE	#	SIZE
Adam Robinson	Jolie Kessler		FW: Sales figures	7/25/2012 10:59 AM	1	127 KB
Adam Robinson	Jason Rao		FW: Sales figures			
Adam Robinson			FW: Sales figures			
Adam Robinson			RE: Sales figures			

Message content:

Hi,

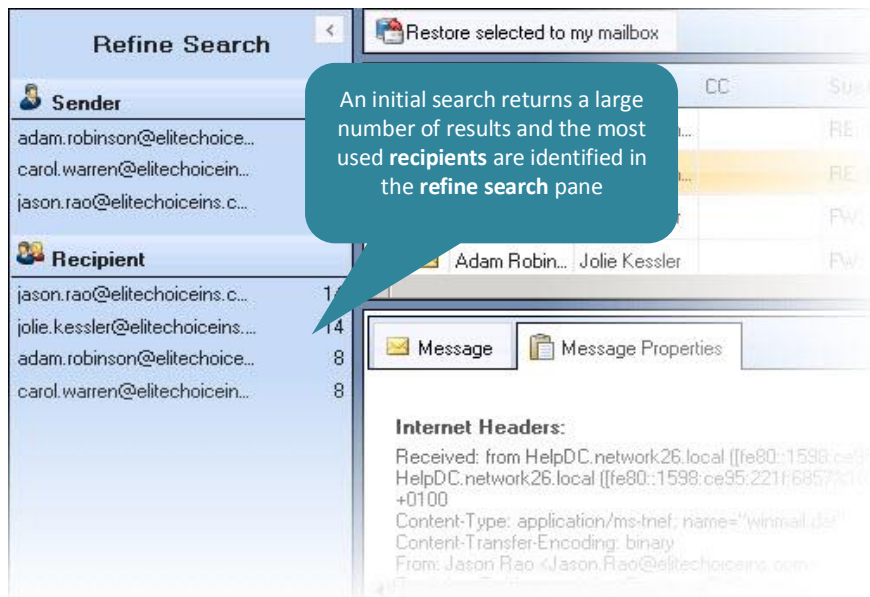
I had noticed that my figures were a little light. The problem has been an ongoing claim against one of my major clients, this has held up their renewal payment. I'm hoping that this will come in next week and should more than make up the shortfall. If you could take a look at the Focus account I think you'll see what I mean.

Kind regards,

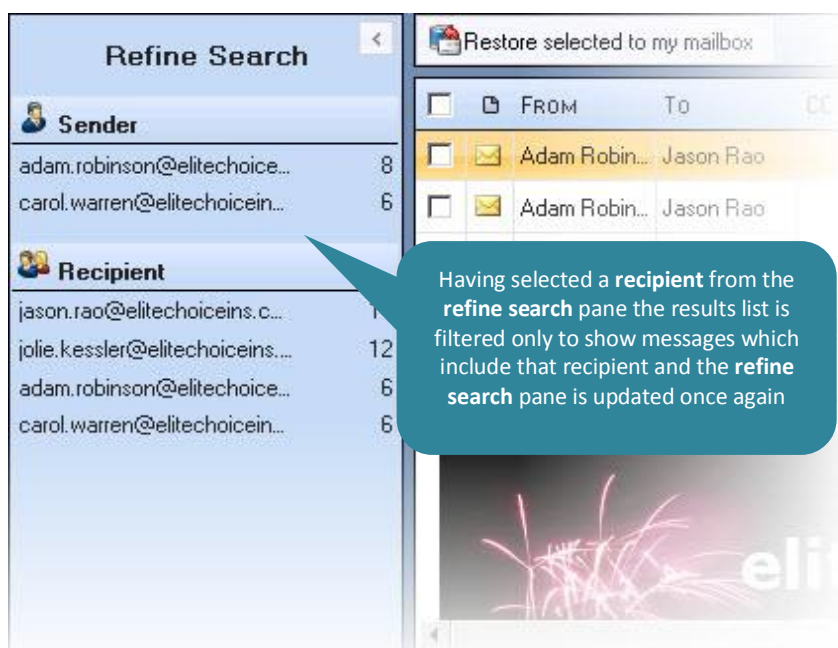
The Refine Search Pane

The [refine search](#) pane is an innovative feature, designed to help you quickly 'drill down' within existing search results to refine the list.

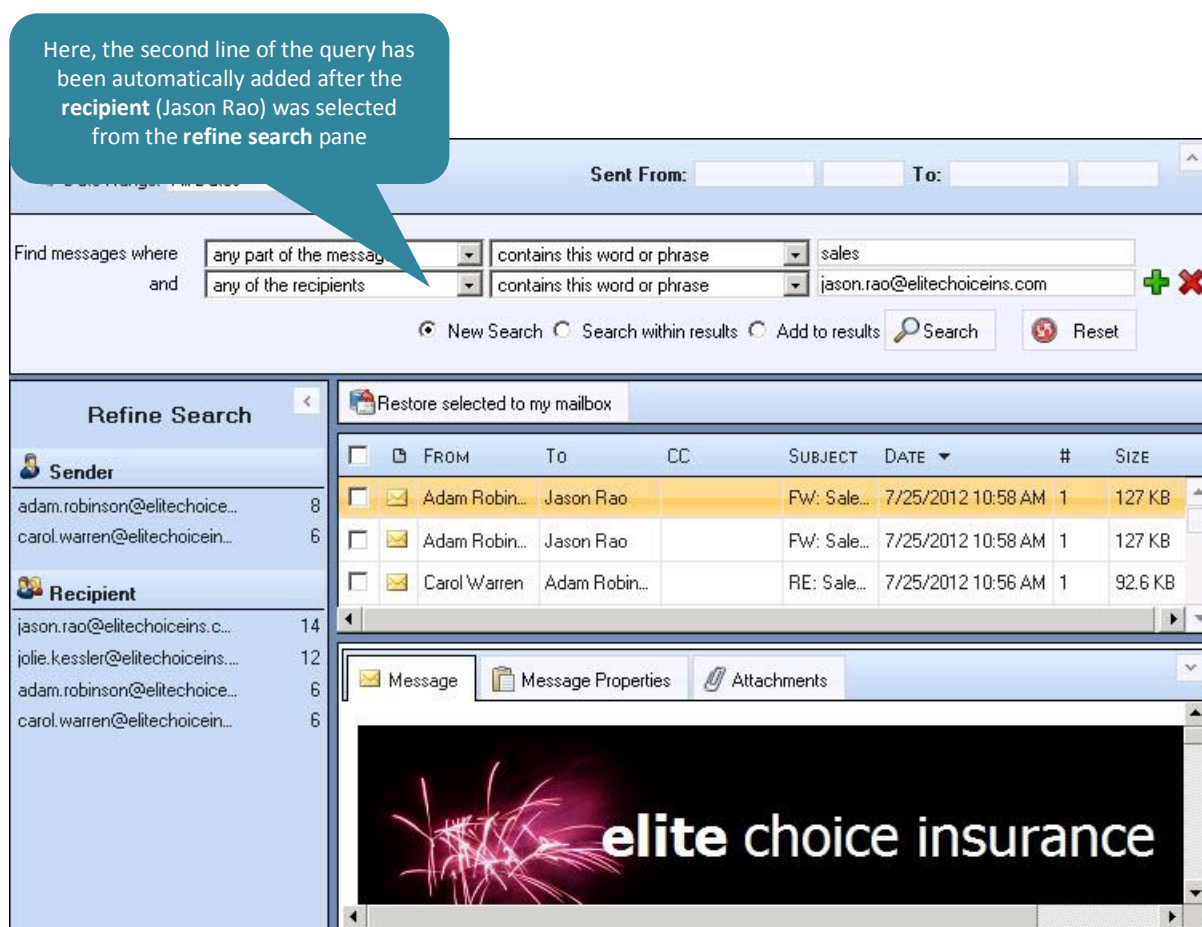
Typically, defining a search involves specifying search conditions, obtaining results and then specifying further conditions to reduce the list of results. Within [Exclaimer Mail Archiver](#), [search queries](#) [pg.182] are built in this way however, the [refine search](#) pane can make this process much faster. When a search is performed, results are analyzed to identify the top five [senders](#), [recipients](#), [conversation topics](#) and [dates](#) (either sent or received) - for example:



When an item is selected from the [refine search](#) pane, the list of results is immediately filtered based upon that selection:



Selecting an option from the [refine search](#) pane is the equivalent of adding search criteria in the [query building pane](#) [pg.182]. Indeed, when a [refine search](#) option is selected, a condition is automatically added to the existing query:



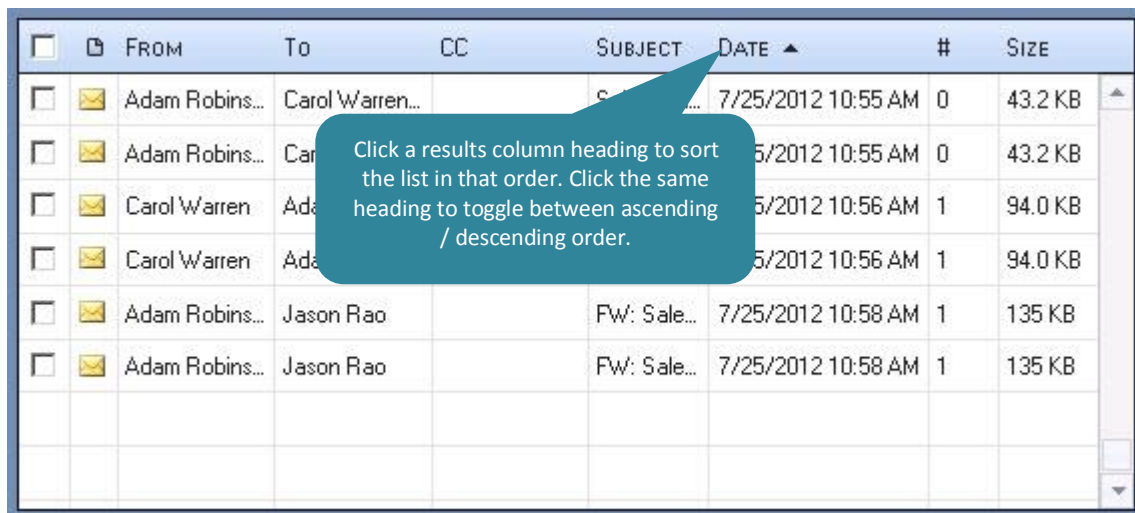
If you have selected a [refine search](#) option but wish to return to your original results list, simply [remove the query lines](#) [pg.184] that were added automatically, ensure that the [new search](#) radio button is selected and click the [search](#) button.

NOTE

The **search** window requires a large amount of screen space. As such, elements of the **search** window can be minimized when not in use and restored when required. The **refine search** pane can be minimized in this way - click the arrow at the very top of the pane to minimize/restore in this way.

Sorting the List of Results

Click a results column heading to sort the list in that order. Click the same heading to toggle between ascending / descending order. An arrow indicates the current sort order and whether sorting is in ascending or descending order:

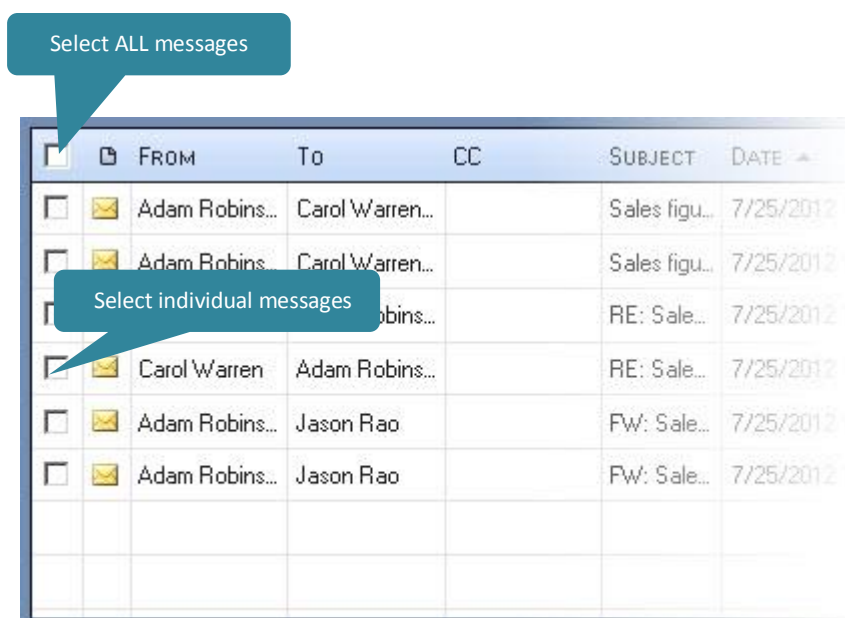


The screenshot shows a table with columns: FROM, To, CC, SUBJECT, DATE, #, and SIZE. The DATE column has an upward arrow, indicating ascending sort order. A callout box points to the DATE column header with the text: "Click a results column heading to sort the list in that order. Click the same heading to toggle between ascending / descending order."

	FROM	To	CC	SUBJECT	DATE ▲	#	SIZE
<input type="checkbox"/>	Adam Robins...	Carol Warren...		S...	7/25/2012 10:55 AM	0	43.2 KB
<input type="checkbox"/>	Adam Robins...	Carol Warren...		S...	7/25/2012 10:55 AM	0	43.2 KB
<input type="checkbox"/>	Carol Warren	Adam Robins...		S...	7/25/2012 10:56 AM	1	94.0 KB
<input type="checkbox"/>	Carol Warren	Adam Robins...		S...	7/25/2012 10:56 AM	1	94.0 KB
<input type="checkbox"/>	Adam Robins...	Jason Rao		FW: Sale...	7/25/2012 10:58 AM	1	135 KB
<input type="checkbox"/>	Adam Robins...	Jason Rao		FW: Sale...	7/25/2012 10:58 AM	1	135 KB

Selecting Messages

Check boxes to the left of each search result can be used to select an entry for further action - i.e. to restore the message to a mailbox. If you wish to restore all messages in the results list, use the check box at the very top of the list to quickly select all messages:



The screenshot shows the same table as above. A callout box points to the top-left checkbox with the text: "Select ALL messages". Another callout box points to the checkbox of the fourth row with the text: "Select individual messages".

<input type="checkbox"/>	FROM	To	CC	SUBJECT	DATE ▲
<input type="checkbox"/>	Adam Robins...	Carol Warren...		Sales figu...	7/25/2012
<input type="checkbox"/>	Adam Robins...	Carol Warren...		Sales figu...	7/25/2012
<input type="checkbox"/>	Adam Robins...	Carol Warren...		RE: Sale...	7/25/2012
<input type="checkbox"/>	Carol Warren	Adam Robins...		RE: Sale...	7/25/2012
<input type="checkbox"/>	Adam Robins...	Jason Rao		FW: Sale...	7/25/2012
<input type="checkbox"/>	Adam Robins...	Jason Rao		FW: Sale...	7/25/2012

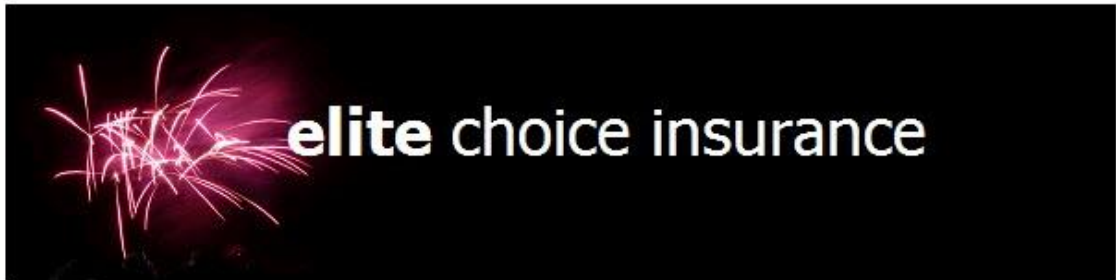
The Message Pane

When a message is highlighted in the results list, its [content](#), [properties](#) and [attachments](#) (if applicable) are displayed in the [message pane](#) at the bottom of the [search](#) window:

The screenshot displays the Exclaimer Mail Archiver interface. At the top is a table listing search results. The fourth row is highlighted in yellow. A blue callout bubble points to the tabs below the table, stating: "The message pane displays message content, message properties and attachments in separate tabs".

	FROM	To	CC	SUBJECT	DATE	#	SIZE
<input type="checkbox"/>	Adam Robinson	Jolie Kessler		FW: Sales figures	7/25/2012 10:59 AM	1	134 KB
<input type="checkbox"/>	Adam Robinson	Jolie Kessler		FW: Sales figures	7/25/2012 10:59 AM	1	134 KB
<input type="checkbox"/>	Adam Robinson	Jason Rao		FW: Sales figures	7/25/2012 10:58 AM	1	135 KB
<input checked="" type="checkbox"/>	Adam Robinson	Jason Rao		FW: Sales figures	7/25/2012 10:58 AM	1	135 KB
<input type="checkbox"/>	Carol Warren			RE: Sales figures	7/25/2012 10:56 AM	1	94.0 KB
<input type="checkbox"/>	Carol Warren			RE: Sales figures	7/25/2012 10:56 AM	1	94.0 KB
<input type="checkbox"/>	Joyce Harris			Extended is wan...	8/4/2011 10:28 AM	1	255 KB
<input type="checkbox"/>	Joyce Harris			Extended is wan...	8/4/2011 10:28 AM	1	255 KB

Below the table, the message pane is active, showing three tabs: "Message" (selected), "Message Properties", and "Attachments". The "Message" tab displays the content of the selected email:



Hi Jason,

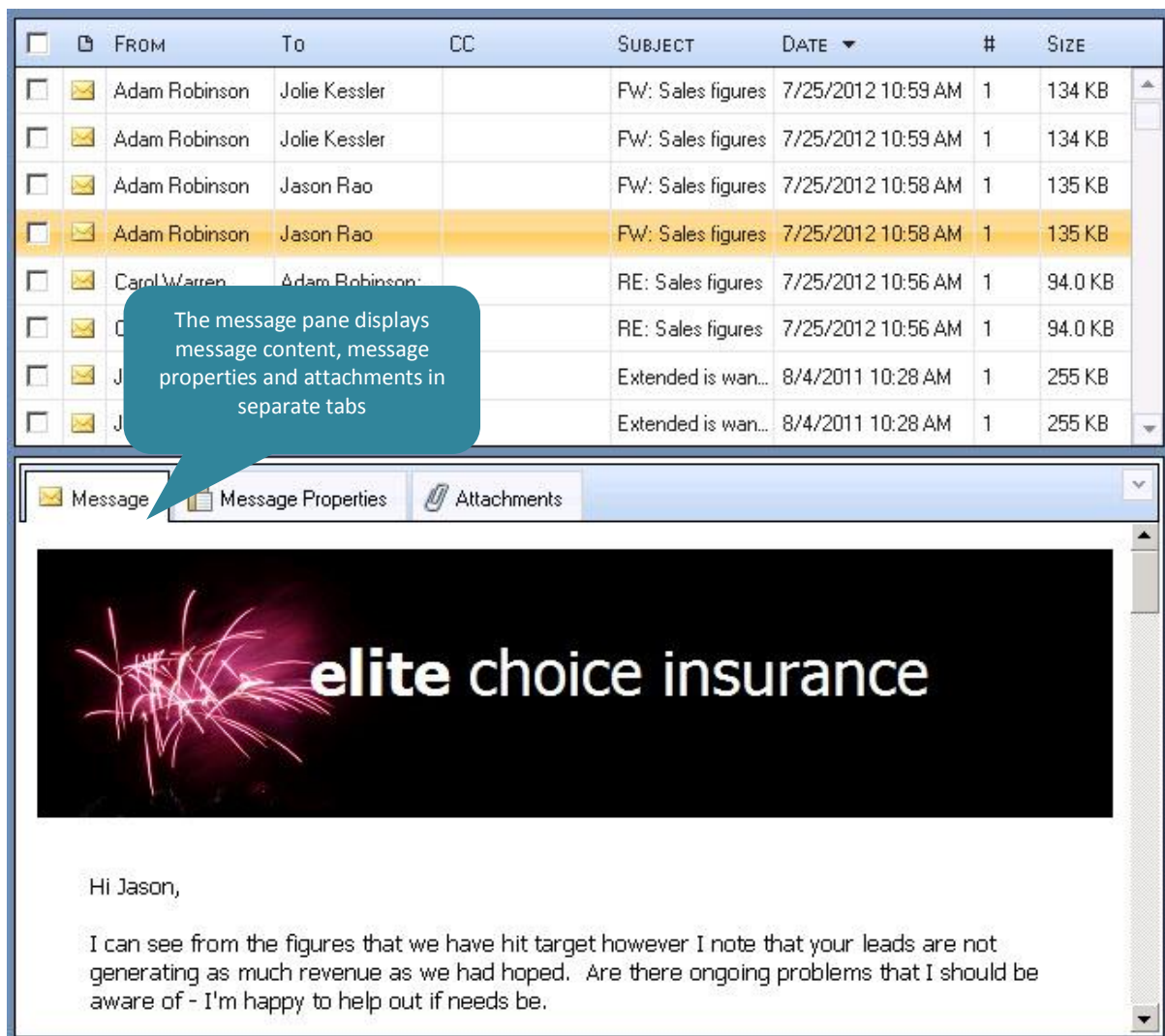
I can see from the figures that we have hit target however I note that your leads are not generating as much revenue as we had hoped. Are there ongoing problems that I should be aware of - I'm happy to help out if needs be.

For a larger view of [message content](#) [pg.195], [properties](#) [pg.196] and [attachments](#) [pg.200], you can double-click the entry to open the message in a separate viewing window. For further information please see [viewing an archived message](#) [pg.193].

Viewing an Archived Message

When [Exclaimer Mail Archiver](#) extracts email messages from a [journaling mailbox](#) [pg.220], the messages are in a special format with the original message attached to a [journal report](#); these messages cannot be viewed as with a standard mailbox. When these messages are archived, they are 'unpacked' from this format and presented in a readable form when viewed via a [search](#) [pg.177].

Having performed a [search](#) to display a [list of results](#) [pg.188], the [content](#) [pg.195], [properties](#) [pg.196] and [attachments](#) [pg.200] for the current message (i.e. the message that is highlighted in the results list) are displayed in the [message pane](#), at the bottom of the [search](#) window:



The message pane displays message content, message properties and attachments in separate tabs

	FROM	To	CC	SUBJECT	DATE	#	SIZE
<input type="checkbox"/>	Adam Robinson	Jolie Kessler		FW: Sales figures	7/25/2012 10:59 AM	1	134 KB
<input type="checkbox"/>	Adam Robinson	Jolie Kessler		FW: Sales figures	7/25/2012 10:59 AM	1	134 KB
<input type="checkbox"/>	Adam Robinson	Jason Rao		FW: Sales figures	7/25/2012 10:58 AM	1	135 KB
<input checked="" type="checkbox"/>	Adam Robinson	Jason Rao		FW: Sales figures	7/25/2012 10:58 AM	1	135 KB
<input type="checkbox"/>	Carol Warren	Adam Robinson		RE: Sales figures	7/25/2012 10:56 AM	1	94.0 KB
<input type="checkbox"/>				RE: Sales figures	7/25/2012 10:56 AM	1	94.0 KB
<input type="checkbox"/>	J			Extended is wan...	8/4/2011 10:28 AM	1	255 KB
<input type="checkbox"/>	J			Extended is wan...	8/4/2011 10:28 AM	1	255 KB

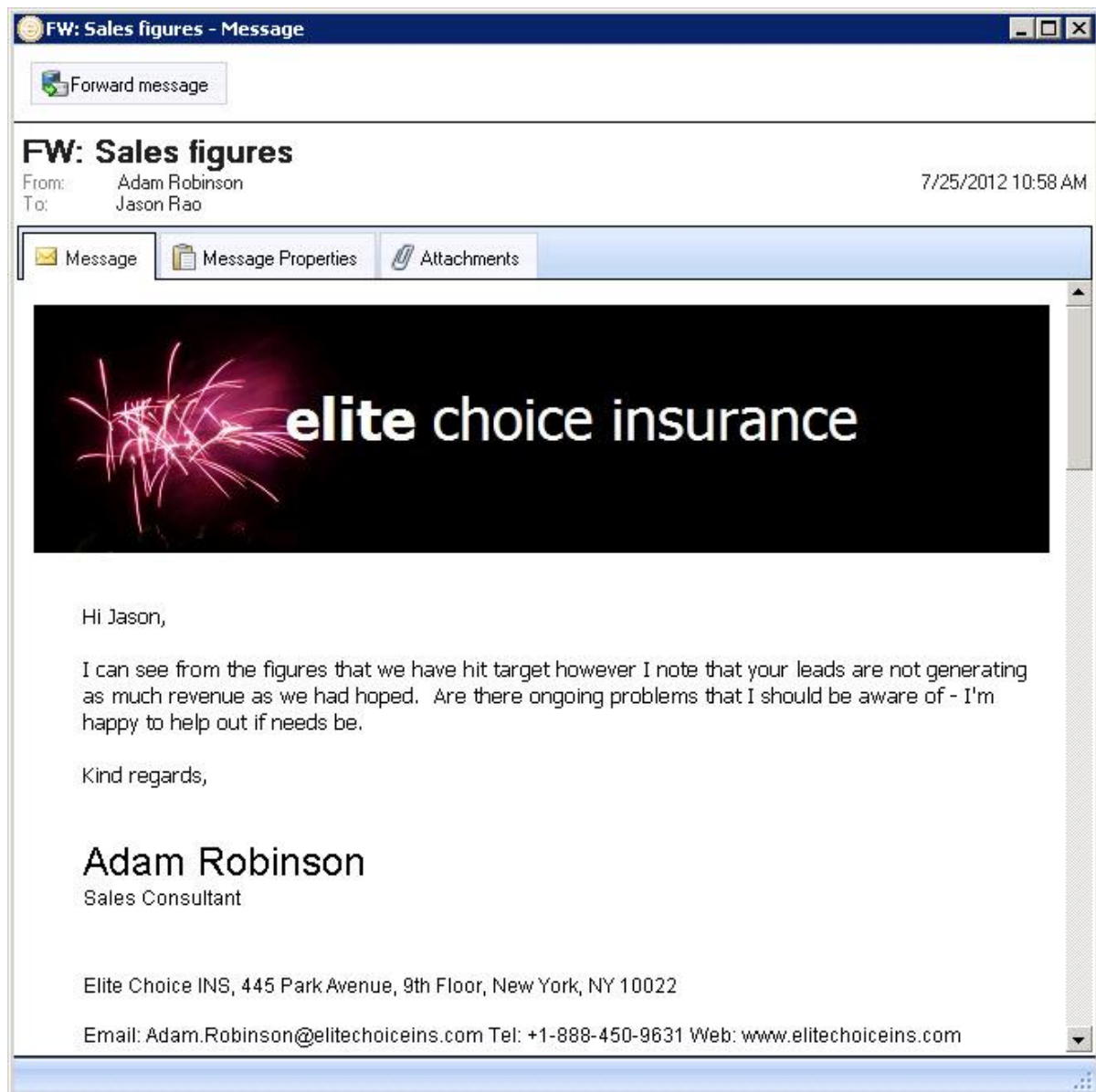
Message | Message Properties | Attachments

elite choice insurance

Hi Jason,

I can see from the figures that we have hit target however I note that your leads are not generating as much revenue as we had hoped. Are there ongoing problems that I should be aware of - I'm happy to help out if needs be.

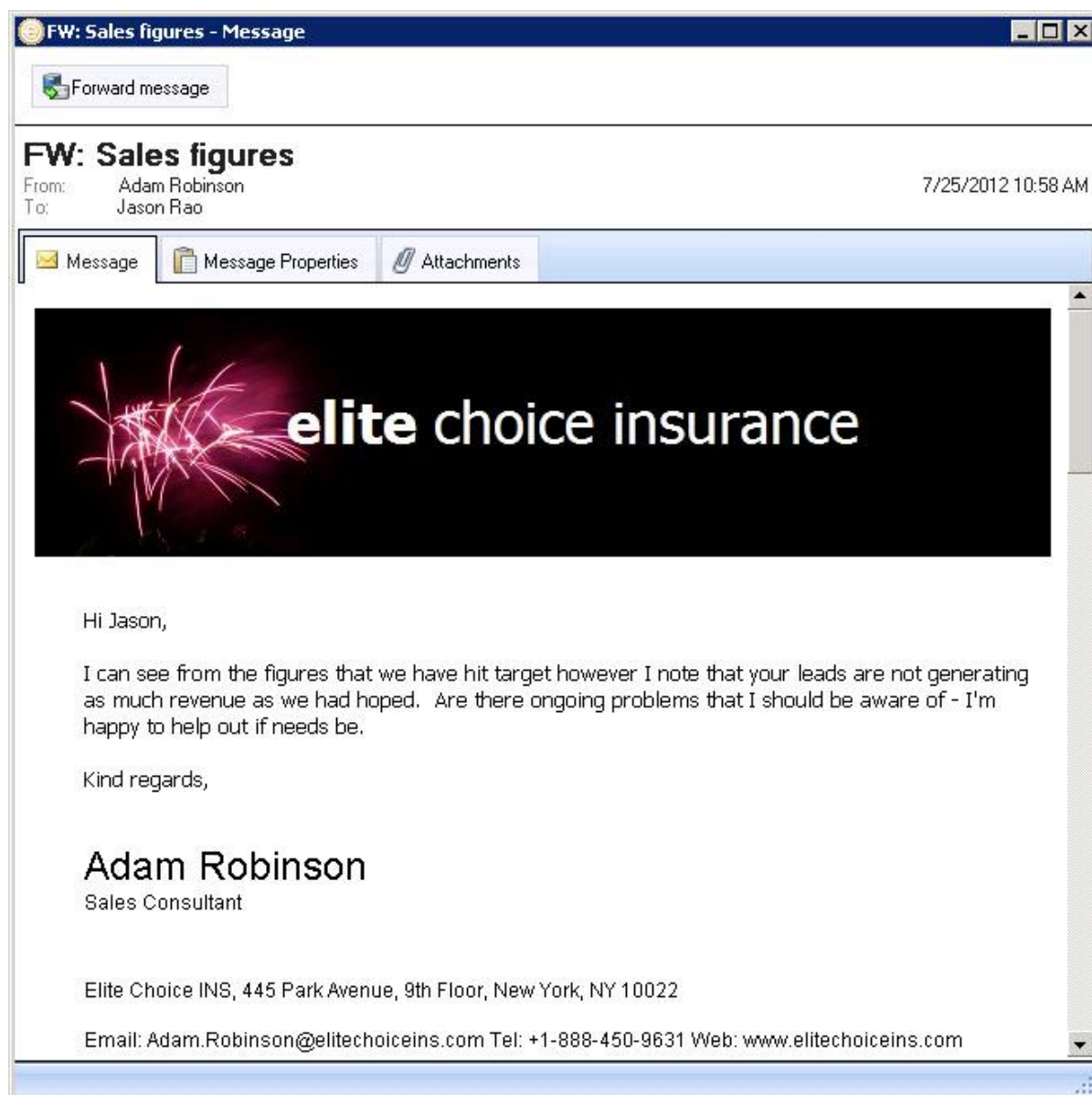
For a larger view of message [content](#) and [properties](#), double-click an entry in the results list. The message is displayed in a new window:



Content for the message is displayed in the [message](#) tab, as shown here. If required, use the [forward](#) option at the top of this window to [forward the message \[pg.203\]](#) to a given email address. Message [properties \[pg.196\]](#) and [attachments \[pg.200\]](#) are displayed in separate tabs.

Message Content

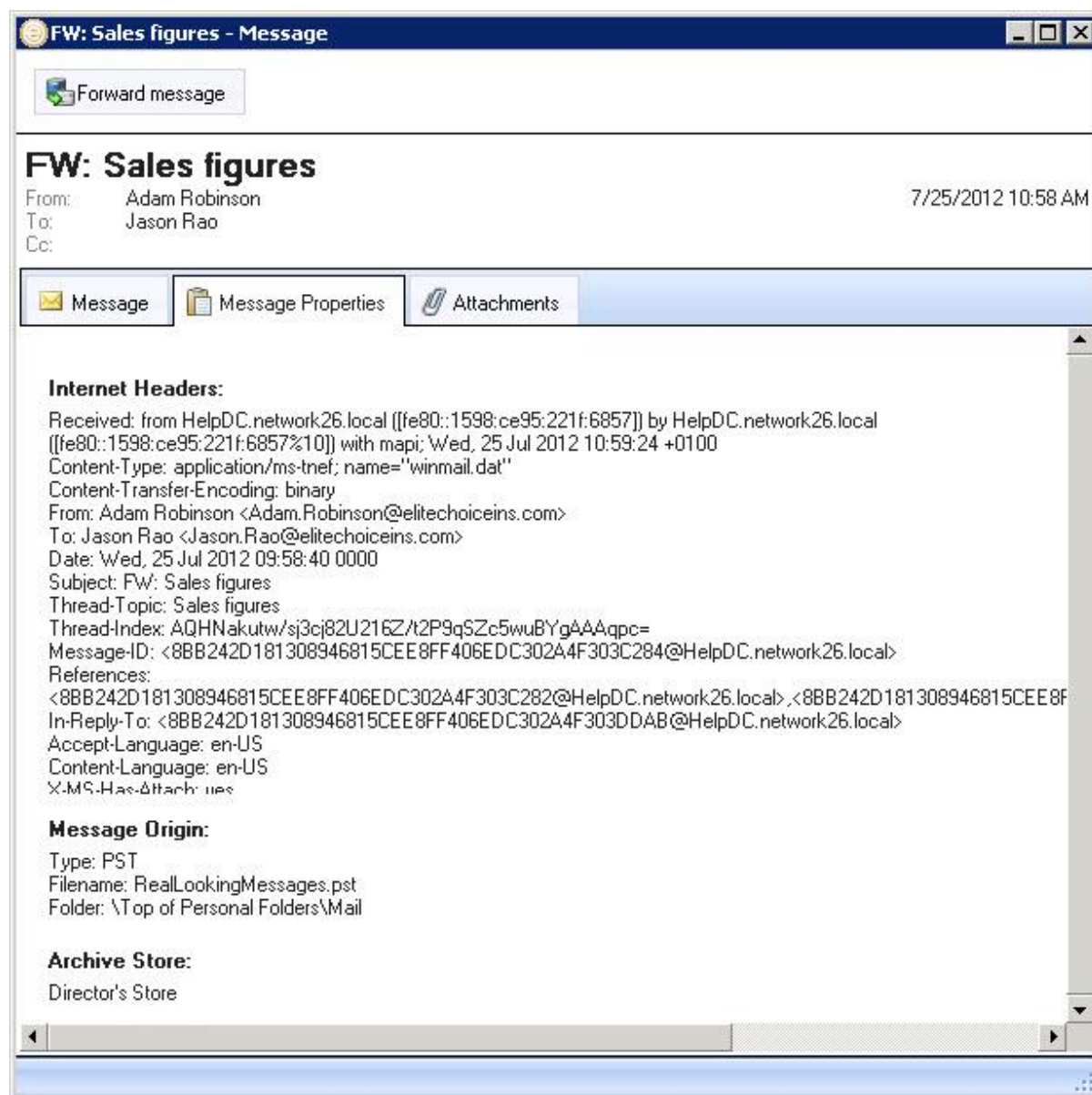
Having performed a [search](#) to display a [list of results](#) [pg.188], the [content](#) [pg.195], [properties](#) [pg.196] and [attachments](#) [pg.200] for the current message (i.e. the message that is highlighted in the results list) are displayed in the [message pane](#), at the bottom of the [search](#) window. The same information is shown when a search result is double-clicked and [opened in a new window](#) [pg.193]:



Content for the message is displayed in the [message](#) tab, [properties](#) are displayed in the [message properties](#) [pg.196] tab and [attachments](#) are shown in the [attachments](#) [pg.200] tab (if present).

Message Properties

Having performed a search to display a list of results, the [content](#) [pg.195], [properties](#) and [attachments](#) [pg.200] for the current message (i.e. the message that is highlighted in the results list) are displayed in the [message pane](#), at the bottom of the [search](#) window. The same information is shown when a search result is double-clicked and opened in a new window:



Content for the message is displayed in the [message \[pg.195\]](#) tab, properties are displayed in the [message properties](#) tab and attachments (if present) are shown in the [attachments \[pg.200\]](#) tab. Message [properties](#) are listed under the following headings:

Property Type	Summary								
Internet headers	An email message is comprised of two parts - the header and the message body. An Internet email header provides a detailed log of the network path taken between the mail sender and the mail receiver(s). It contains a range of information about the message, including which servers the email has travelled via, and when. Internet header information is often used to troubleshoot problems with mail delivery.								
Delivered to	Displays a list of message recipients - i.e. anyone specified in the To , CC or BCC fields. However, it is important to note that BCC information is restricted according to defined access permissions [pg.198] .								
Message origin	Shows where the message originated from prior to being archived - typically this would be a user's mailbox however, if the message was a legacy email that was imported [pg.135] into Exclaimer Mail Archiver , the import source will be displayed (as shown in the previous example). Origin details for the different message types are summarized below: <table border="1"> <tr> <td>PST File</td><td>Type: PST Filename: backup.pst (e.g. only) Folder: inbox\Customers\A-C (e.g. only)</td></tr> <tr> <td>User Mailbox</td><td>Type: Exchange Mailbox Mailbox Name: Joe Bloggs (e.g. only) Folder: Inbox\Staff\Joshua (e.g. only)</td></tr> <tr> <td>Public Folder</td><td>Type: Public Folder Folder: Sales & Marketing\Sales\09 (e.g. only)</td></tr> <tr> <td>Journalized Messages</td><td>Type: Journal Mailbox Mailbox Name: Journal (e.g. only)</td></tr> </table>	PST File	Type: PST Filename: backup.pst (e.g. only) Folder: inbox\Customers\A-C (e.g. only)	User Mailbox	Type: Exchange Mailbox Mailbox Name: Joe Bloggs (e.g. only) Folder: Inbox\Staff\Joshua (e.g. only)	Public Folder	Type: Public Folder Folder: Sales & Marketing\Sales\09 (e.g. only)	Journalized Messages	Type: Journal Mailbox Mailbox Name: Journal (e.g. only)
PST File	Type: PST Filename: backup.pst (e.g. only) Folder: inbox\Customers\A-C (e.g. only)								
User Mailbox	Type: Exchange Mailbox Mailbox Name: Joe Bloggs (e.g. only) Folder: Inbox\Staff\Joshua (e.g. only)								
Public Folder	Type: Public Folder Folder: Sales & Marketing\Sales\09 (e.g. only)								
Journalized Messages	Type: Journal Mailbox Mailbox Name: Journal (e.g. only)								
Archive store	The name of the store to which the message has been archived.								

Availability of BCC Information

When a search is performed, a user will only see results which they have access permissions to view. Typically, most users will at least have access to their own messages - i.e. messages that they sent or received (either directly or by being copied in). However, an additional level of checking is also performed to determine what [message properties](#) can be seen.

When viewing [message properties](#), the [delivered to](#) section displays details of message recipients - i.e. anyone specified in the [to](#), [cc](#) or [bcc](#) fields. However, [bcc](#) information will only be shown to users who have appropriate permissions, based upon the following rules:

Rule	Summary
Rule 1	BCC and delivery information will always be visible to the message sender .
Rule 2	BCC and delivery information will be visible to anyone who has rights to see messages of the message sender .
Rule 3	BCC and delivery information will only show the intersection of the set of email addresses in the delivered to field and those permitted to the viewer of the message, unless rule 2 or rule 1 permit otherwise.

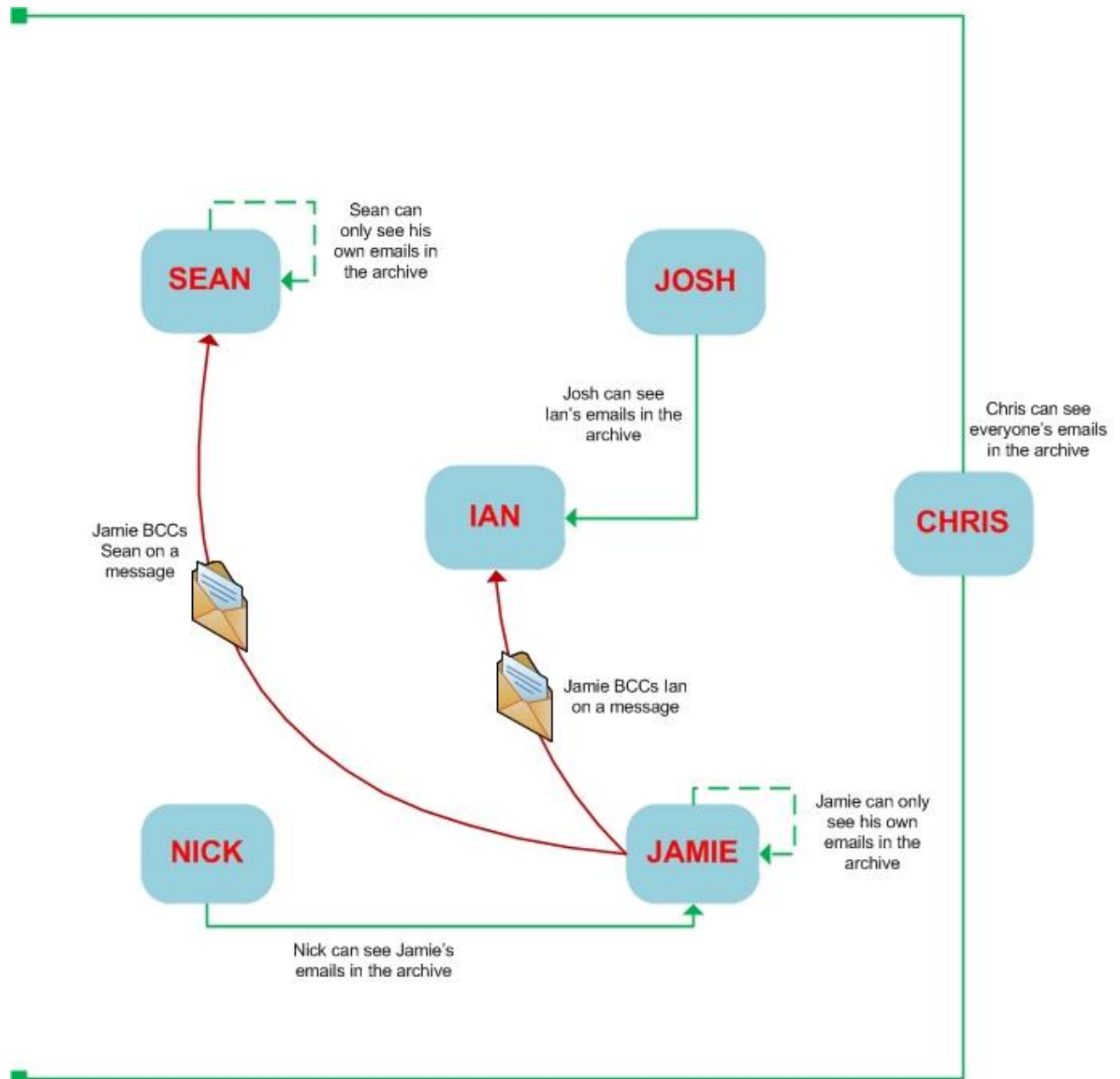
Access Permissions Scenario

The following scenario demonstrates these rules:

- [Josh](#) has permissions to [Ian's](#) messages
- [Nick](#) has permissions to [Jamie's](#) messages
- [Sean](#) and [Jamie](#) have [self only](#) permissions
- [Chris](#) has [everyone](#) permissions

[Jamie](#) sends an email to an external customer (Karen@GreenOrg.net) and includes [Ian](#) and [Sean](#) as [BCC](#) recipients. This scenario is illustrated on the following page.

Jamie sends an email to an external customer (Karen@GreenOrg.net) and includes Ian and Sean as BCC recipients:

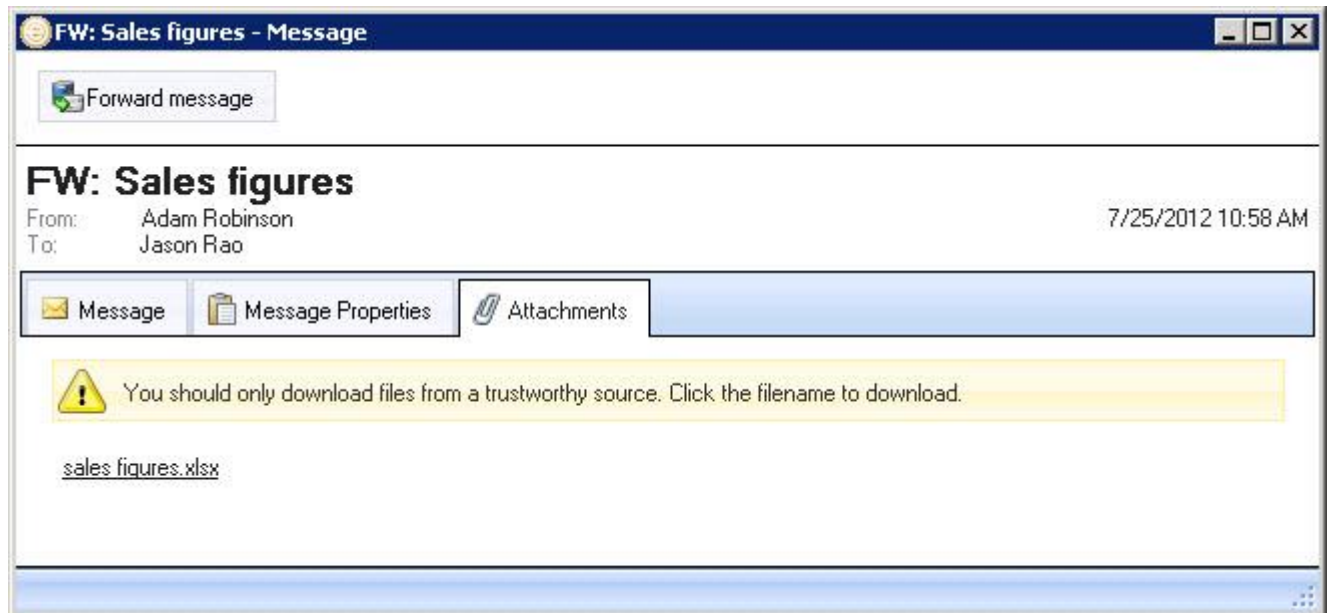


In this case, the **delivered to** information would be displayed as follows:

- When Josh views **message properties**, the **delivered to** and **BCC** field will show Ian only
- When Sean views **message properties**, the **delivered to** and **BCC** field will show Sean only
- When Jamie views **message properties**, the **delivered to** and **BCC** field will show Ian and Sean
- When Nick views **message properties**, the **delivered to** and **BCC** field will show Ian and Sean
- When Chris views **message properties**, the **delivered to** and **BCC** field will show Ian and Sean

Message Attachments

Having performed a search to display a list of results, the [content](#) [pg.195], [properties](#) [pg.196] and [attachments](#) for the current message (i.e. the message that is highlighted in the results list) are displayed in the [message pane](#), at the bottom of the [search](#) window. The same information is shown when a search result is double-clicked and opened in a new window:



The [attachments](#) tab is only displayed if the message contains at least one attachment. Any attachments are listed and, if you are satisfied that the sender is a trustworthy source, each item can be clicked and downloaded.

Restoring a Message

Having performed a [search](#) [pg.177] to display a [list of results](#) [pg.187], archived messages can be selected and restored to a mailbox.

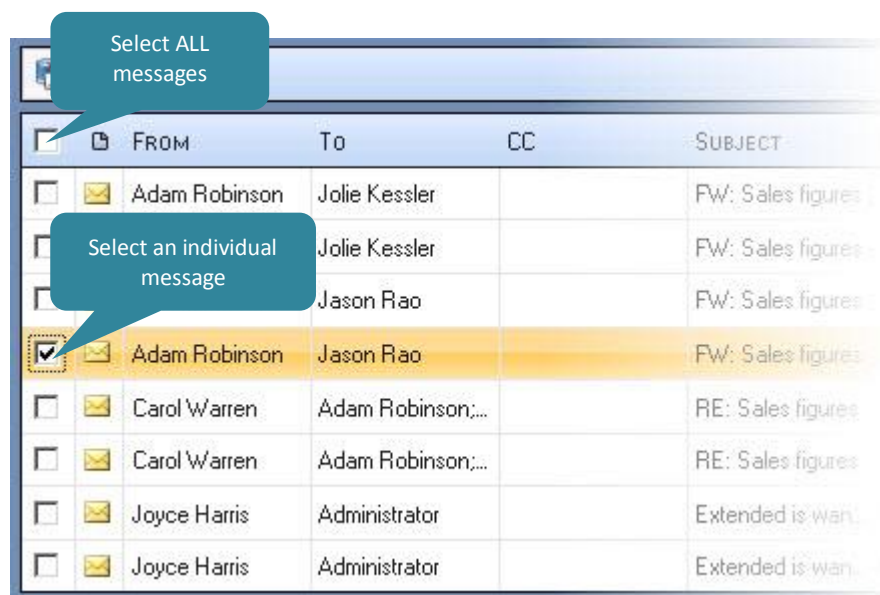
Required Setup for Restoring Messages

In order to [restore](#) messages, the following [Mail Archiver](#) settings must be defined:

- The [enable restore to mailbox](#) [pg.46] option must be selected in [Mail Archiver settings](#) [pg.45].
- [Exclaimer Mail Archiver](#) needs authority to access [Exchange](#) mailboxes for all users - this is known as [Exchange Impersonation](#). An [Exchange impersonation account](#) [pg.47] must be configured in [Mail Archiver settings](#) [pg.45].

The Restore Process

You can select a single message, or all messages in the list of results:



Having selected the required message(s), click the [restore selected](#) button (at the top of the results list) to display your mailbox folder structure (note that the restoration process allows you to restore messages to your own mailbox only):



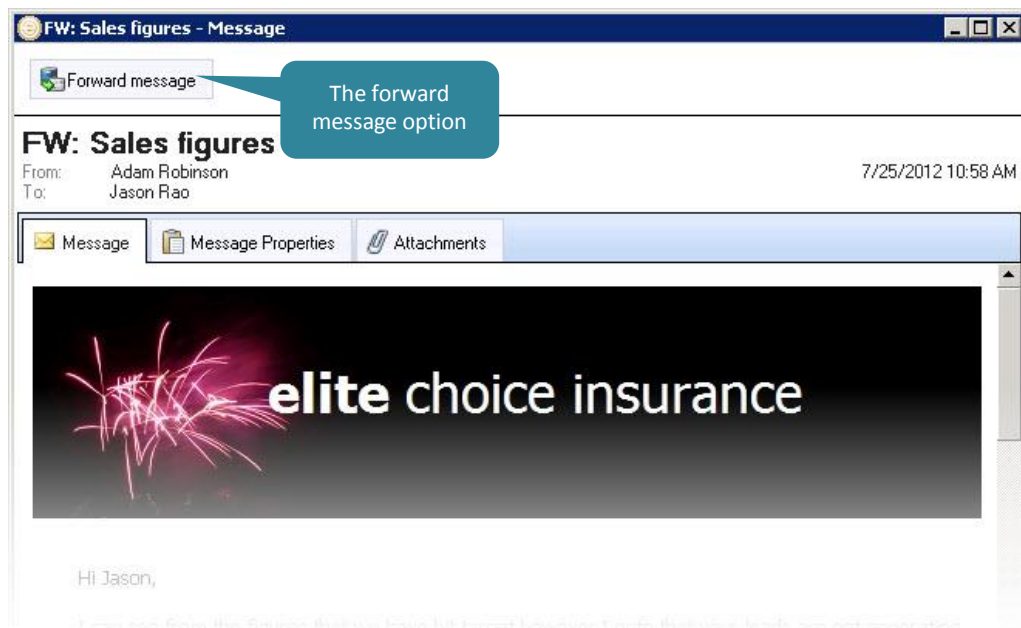
Expand the folder structure to select a destination for the restored messages, or to create a new folder: Messages can be restored to any displayed location however; it is often advisable to create a separate sub folder for restored messages to ensure that they are not 'buried' amongst lots of existing messages. Once restored, messages can be viewed normally in [Outlook](#); these messages will always appear as [unread](#) messages with the date and time that the restored message was originally sent.

As an alternative to restoring a message, the [forward](#) [\[pg.203\]](#) option can be used to forward the message to a given email address.

Forwarding a Message

To forward an archived message to a specified email address, follow the steps below:

1. Perform a [search](#) [pg.177] to display required [results](#) [pg.187].
2. Double-click the message that you wish to forward. The message is [opened in a separate window](#) [pg.193]:



3. Click the forward message button at the top of the message to open a forwarding window:



4. Enter the required email address and click **OK** to forward the email to the specified address. When the forwarded message is received, it will appear to be from the person whose mailbox the message was archived from.

NOTE

As an alternative to forwarding a message, the [restore](#) option [pg.201] can be used to restore the message to a given mailbox.

Required Setup for Forwarding Messages

When a message is forwarded, a new message is created with the content of the forwarded message and sent to the recipients email address (i.e. the forwarded message will be [from](#) the user who has performed the search and chosen to forward the message). To achieve this, [Exclaimer Mail Archiver](#) needs access to the [Exchange Web Services URL](#), as defined in [Mail Archiver settings](#) [pg.45].

Web Search

The [web search](#) facility allows users to access mail archives from a browser on a desktop PC and also from a Blackberry, iPhone, Android, or any web-enabled mobile device. Users have the choice of working with two web search modes:

- The [rich user interface](#) [pg.208] (ideal when working on a desktop PC).
- The [lightweight user interface](#) [pg.212] if working with a mobile device.

Accessing the Web Search

The [web search](#) facility is automatically installed with [Exclaimer Mail Archiver](#). The [web search](#) can be accessed from any web-enabled computer or mobile device by opening a browser and entering the appropriate URL.

When the [search](#) component of [Exclaimer Mail Archiver](#) is [installed \[pg.13\]](#), a shortcut for the [web search](#) is automatically created on the host machine and can be accessed by selecting the [Exclaimer Mail Archiver WebSearch](#) option from the [Windows start menu](#) (within the [Exclaimer](#) folder) on that machine. Other users can create their own shortcut to the appropriate URL on their desktop computers or mobile devices.

NOTE

By default, the **web search** installation is configured so that it is accessed by <http://COMPUTERNAME:53444> where [COMPUTERNAME](#) is the name of the machine where the search is installed. Whether you access the **web search** facility directly or first need to log into your organization's network via a remote server will depend upon the setup within your organization. For further information, please refer to the [Exclaimer Knowledgebase](#).

Logging In

Once loaded, the [web search](#) URL displays a [login](#) page:

Here, details should be completed as follows:

Field	Summary
Security	Use this is a public or shared computer and this is a private computer as appropriate. This setting determines how long the web search can be idle before logging out. The public timeout is 15 minutes and the private timeout is 8 hours.
Use the light version...	The web search can be run in two modes - rich user interface [pg.208] and lightweight user interface [pg.212]. The light option is often preferable when accessing the web search from a mobile device. It is possible to switch between rich and light modes once logged in.
Username / Password	Valid Active Directory login credentials must be supplied in order to access the web search .
Language	Search options are available in English (UK) or English (US) .
Time zone	All standard time zones are available for selection.

Having completed login details, click [sign in](#) to access the [rich](#) [pg.208] or [light](#) [pg.212] search window. Note that if you are using a browser that does not support the [rich](#) version, only the [light](#) version will be available to you.

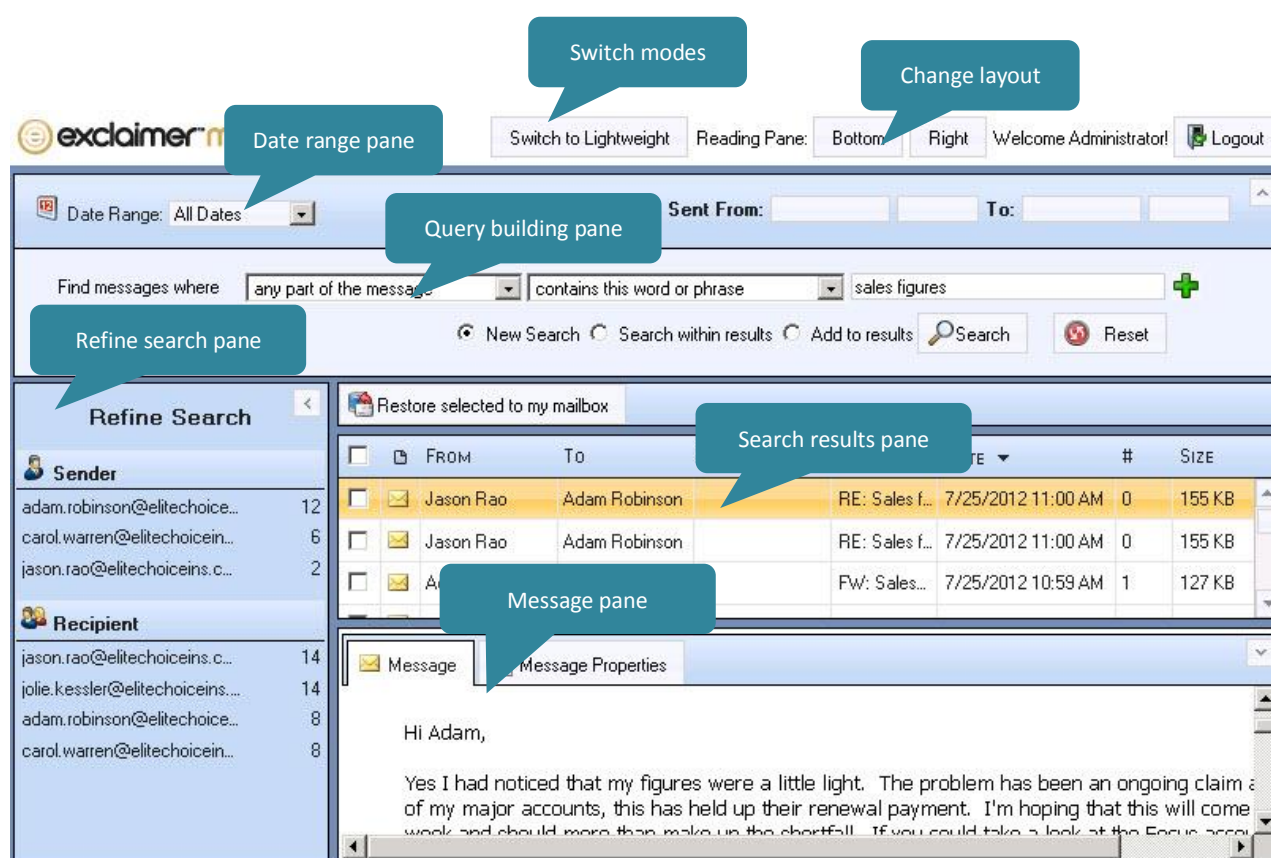
Rich UI

Having logged into the [web search](#) facility with the [rich user interface](#), the search window is very similar to the [console search](#) [pg.177], with the same appearance and functionality.

This section highlights aspects of the [web search](#) which are specific to the [rich user interface web search](#) but it may be useful to read the [console search](#) [pg.177] section for further information.

Understanding the Web Search Window (Rich UI)

Having logged into the [web search](#) with the [rich user interface](#), the [search](#) window is displayed, as shown below:



Broadly, the search window is split into five panes:

- The [date range pane](#) [pg.209]
- The [query building pane](#) [pg.209]
- The [search results pane](#) [pg.209]
- The [refine search pane](#) [pg.209]
- The [message pane](#) [pg.192]

Options are available to manage [how these panes are displayed](#) [pg.210] and also to [switch search mode](#) [pg.210].

The Date Range Pane

Date options are used to search for messages sent/received within a given time period. These options work in exactly the same way as detailed in the [console search \[pg.177\]](#) section - please refer to [date range pane \[pg.186\]](#) information in this section.

The Query Building Pane

Query options are used to define criteria upon which the search is based. Three fields are used to define a query - the first field is used to choose which part of the message (or details about the message/store) should be used for matching, the second is used to select a condition for the query (for example, [contains](#), [does not contain](#)) and the third is used to specify the required value to be matched (for example, a [word or phrase](#)). These options work in exactly the same way as detailed in the [console search \[pg.177\]](#) section - please refer to [query building pane \[pg.182\]](#) information in this section.

NOTE

If more than one **archive store** has been defined, all stores (for which you have associated [access permissions \[pg.121\]](#)) will be searched. If required, a search can be restricted to a specific store by adding a [store name condition \[pg.70\]](#) to a query.

The Search Results Pane

Having performed a search, matched results are displayed and messages can be [viewed \[pg.211\]](#). When any search is performed ([console search \[pg.177\]](#), [rich web search](#) or [lightweight web search \[pg.212\]](#)) a user will only see results which they have access permissions to view. For further information, please refer to the [working with search results \[pg.187\]](#) section.

The search results pane and associated options for [selecting \[pg.191\]](#), [restoring \[pg.201\]](#) and [forwarding \[pg.203\]](#) messages work in exactly the same way as detailed in the [console search \[pg.177\]](#) section - please refer to [search results pane \[pg.188\]](#) information in this section.

The Refine Search Pane

The [refine search](#) pane is an innovative feature, designed to help you quickly 'drill down' within existing search results to refine the list. This works in exactly the same way as detailed in the [console search \[pg.177\]](#) section - please refer to [refine search pane \[pg.189\]](#) information in this section.

The Message Pane

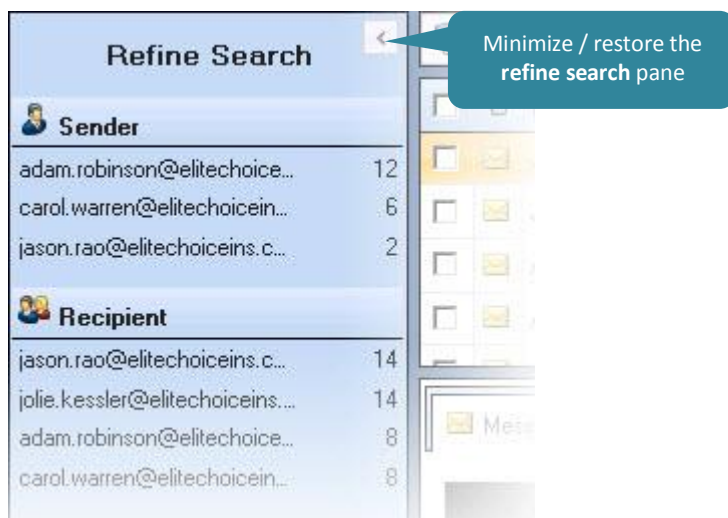
When a message is highlighted in the results list, its [content \[pg.195\]](#), [properties \[pg.196\]](#) and [attachments \[pg.200\]](#) (if applicable) are displayed in the [message pane](#) at the bottom of the [search](#) window. This pane works in exactly the same way as detailed in the [console search \[pg.177\]](#) section - please refer to [message pane \[pg.192\]](#) information in this section.

Switching Search Modes

The [lightweight](#) search option is recommended when searching mail archives on a mobile device. To change to this mode, simply select the [switch to lightweight](#) option at the top of the [web search](#) window.

Managing Search Window Panes

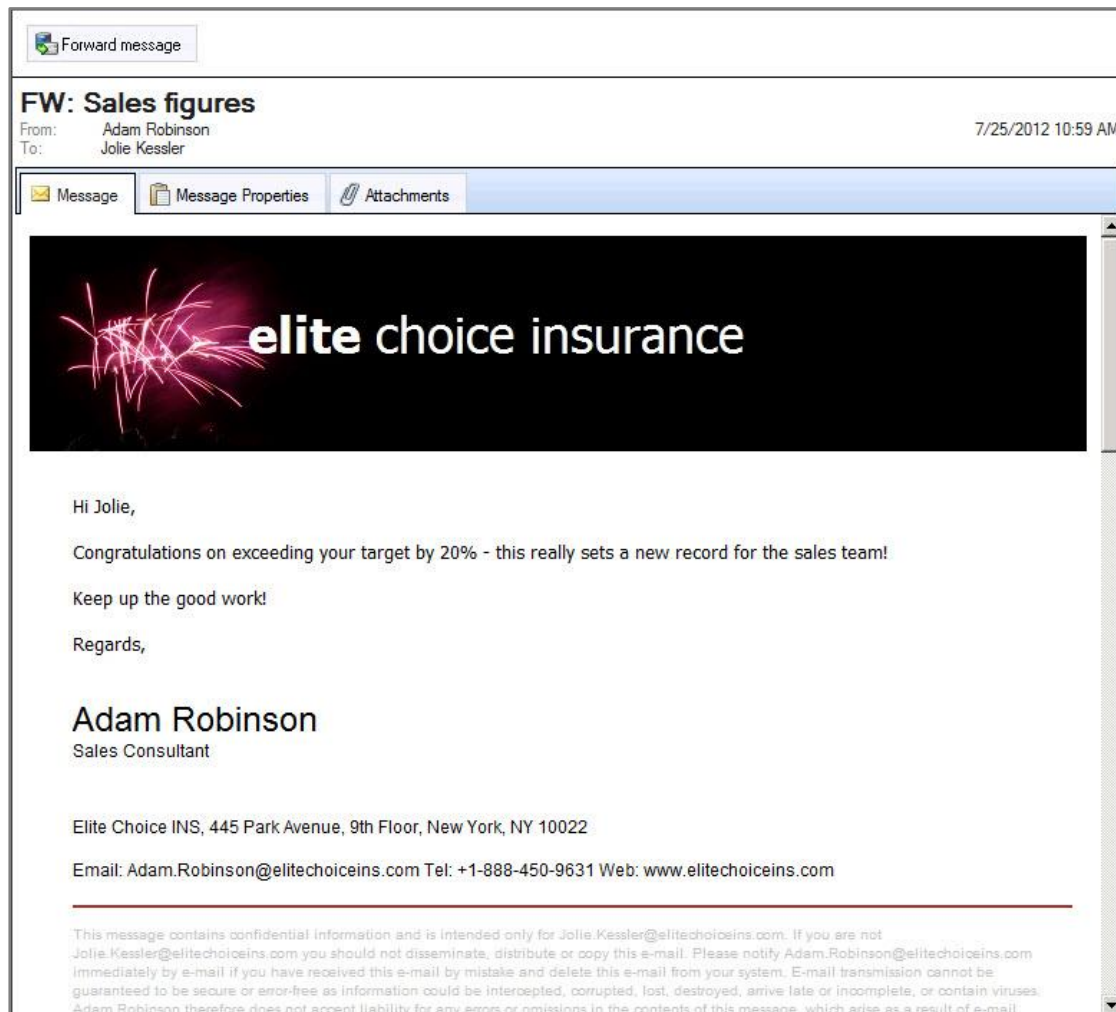
The [search](#) window requires a large amount of screen space. To help manage this space, you can choose where to position the message pane ([bottom](#) or [right](#)). Additionally, elements of the [search](#) window can be minimized and restored when required. If a [search](#) pane can be minimized in this way, an arrow is displayed - for example:



Viewing an Archived Message (Rich UI)

Having performed a search to display a list of results, the [content](#), [properties](#) and [attachments](#) for the current message (i.e. the message that is highlighted in the results list) are displayed in the [message pane](#) [pg.209], at the bottom of the search window.

For a larger view of message [content](#) and [properties](#), double-click an entry in the results list. The message is displayed in a new window:



Content for the message is displayed in the [message](#) tab, as shown here. If required, use the [forward](#) option at the top of this window to [forward the message](#) [pg.203] to a given email address. Message [properties](#) [pg.196] and [attachments](#) [pg.200] are displayed in separate tabs.

Lightweight UI

The [lightweight](#) web search is ideal for accessing mail archives on a mobile device. Having logged into the [web search](#) facility with the [lightweight user interface](#), the [basic](#) search window is displayed. As the name suggests, this window is a pared down version of the equivalent [console](#) [pg.177] and [rich user interface](#) [pg.208] search facilities, however, it is still possible to [quickly search for keywords or phrases anywhere within messages](#) [pg.212], or use [advanced](#) [pg.213] options to search specific elements of email messages and/or search within a given time period.

[Search results](#) [pg.214] are displayed in a search engine-style results list. The content of a message can be [viewed](#) [pg.215] by selecting an entry from the results list - the message is opened in a new window and can be [forwarded](#) [pg.216] to a specified address, if required.

Understanding the Web Search Window (Light UI)

Having [accessed the lightweight web search](#) [pg.212], an initial window is displayed which is used to enter a key word or phrase:

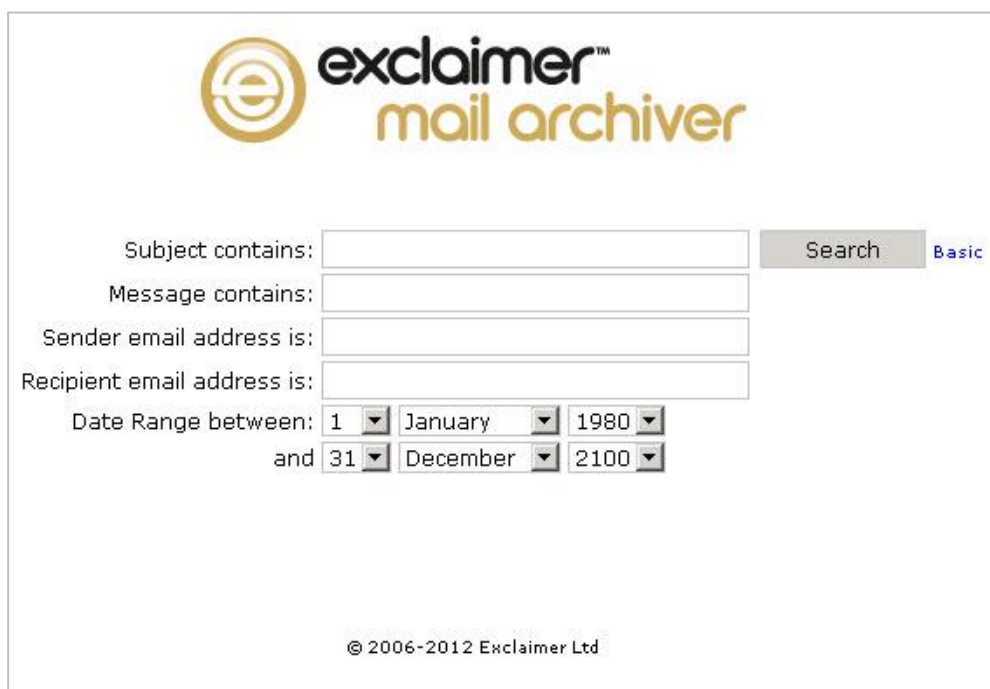
The screenshot shows the Exclaimer Mail Archiver search interface. At the top, there is a logo consisting of a stylized 'e' inside a circle, followed by the text 'exclaimer™' and 'mail archiver' in a smaller font. Below the logo is a search input field with a placeholder text. To the right of the input field is a 'Search' button and a link labeled 'Advanced'. At the bottom of the interface, there is a copyright notice: '© 2006-2012 Exclaimer Ltd'.

Here, enter a word or phrase to be matched anywhere within email messages – i.e. in the message subject or body, in the contents of any attachments or in the sender/recipients details. If multiple words are entered in this field, they are treated as a phrase.

Press the search button to perform the search and display a list of messages that match specified criteria in a [results window](#) [pg.214]. Alternatively, select the [advanced](#) [pg.213] link to access options to perform a more detailed search.

Advanced Options

Advanced options are used to search within specific elements of email messages and/or to search within a given time period:



The screenshot displays the Exclaimer Mail Archiver search interface. At the top, the logo consists of a stylized 'e' in a circle followed by the text 'exclaimer™ mail archiver'. Below the logo, there are five search criteria, each with a text input field: 'Subject contains:', 'Message contains:', 'Sender email address is:', 'Recipient email address is:', and 'Date Range between:'. The 'Date Range between:' field is expanded, showing a date range from '1 January 1980' to '31 December 2100'. To the right of the input fields is a 'Search' button and a 'Basic' link. At the bottom of the interface, the copyright notice '© 2006-2012 Exclaimer Ltd' is visible.

Advanced options are summarized below:

Option	Conditions Summary
Subject contains	Enter a word or phrase to be matched in the subject line of email messages (if multiple words are entered in this field, they are treated as a phrase).
Message contains	Enter a word or phrase to be matched in the body or subject of email messages (if multiple words are entered in this field, they are treated as a phrase).
Sender email address is	Enter an email address to be matched in the from field of email messages.
Recipient email address is	Enter an email address to be matched in the delivery to properties for messages. Recipient information is checked in to , cc and bcc fields, although access to bcc information is dependent upon the user's access permissions. For further information please refer to the availability of BCC information [pg.198] .
Date range between	Use drop-down fields to define a date range, between which messages will be matched. Note that defined dates are inclusive.

Working with Search Results

Search results are displayed in the form of a web search:

The screenshot shows the Exclaimer Mail Archiver interface. At the top, it says 'Welcome Administrator! [Sign out] Switch to Rich UI'. Below this is a search bar containing the text 'sales' and a 'Search' button. To the right of the search bar is a link labeled 'Advanced'. Below the search bar, the results are listed under the heading 'Results 1-10'. Each result is a list item with a subject line, sender, recipient, date, time, and size. Callouts point to various elements: 'Start a new search' points to the search bar; 'Access advanced search options' points to the 'Advanced' link; 'The search results list' points to the list of results; and 'Click any message to view in a separate window and access further options' points to one of the result entries.

Welcome Administrator! [Sign out] Switch to Rich UI

Start a new search

Access advanced search options

sales Search Advanced

Results 1-10

The search results list

Click any message to view in a separate window and access further options

To returned Melissa's do, determines keeper!
Thomas.Nicholson@testnet.local to Thomas.Nicholson@testnet.local - 3/19/2013 2:44:02 PM - 7.4 KB

The they the production, be to Newman strip.
Francesca.J.Hale@testnet.local to Francesca.J.Hale@testnet.local - 4/30/2014 2:42:11 PM - 14.0 KB

To were court going, pamphlet I be took to.
Isabel.R.Bibi@testnet.local to Isabel.R.Bibi@testnet.local - 4/30/2014 2:42:11 PM - 65.6 KB

At price sculptures, even, the shed had the number smiling with.
Louie.K.Vincent@testnet.local to Louie.K.Vincent@testnet.local - 3/19/2013 2:44:02 PM - 19.6 KB

Vuln... mission the.
Isaac.R... testnet.local - 4/30/2014 2:42:12 PM - 50.8 KB

The t... support aware.
Administrator@testnet.local to Administrator@testnet.local - 4/30/2014 2:43:01 PM - 245 KB

State and and any or and to.
Freya.J.Vincent@testnet.local to Freya.J.Vincent@testnet.local - 4/30/2014 2:43:02 PM - 387 KB

Also including folk I waters Christine's be, of a leaning.
Lucy.B.Gallagher@testnet.local to Lucy.B.Gallagher@testnet.local - 4/30/2014 2:42:07 PM - 63.1 KB

Cater you environmental English existed grey work the would possible.
Elise.A.Metcalf@testnet.local to Elise.A.Metcalf@testnet.local - 4/30/2014 2:42:07 PM - 78.1 KB

When any search is performed ([console search](#) [pg.177], [rich web search](#) [pg.208] or [lightweight web search](#)) a user will only see results which they have access permissions to view. In addition, if [auditing](#) [pg.171] is configured then their search phrase and messages viewed will be recorded to the [ExAudit](#) event log. For further information, please refer to the [working with search results](#) [pg.187] section. From the results list you can:

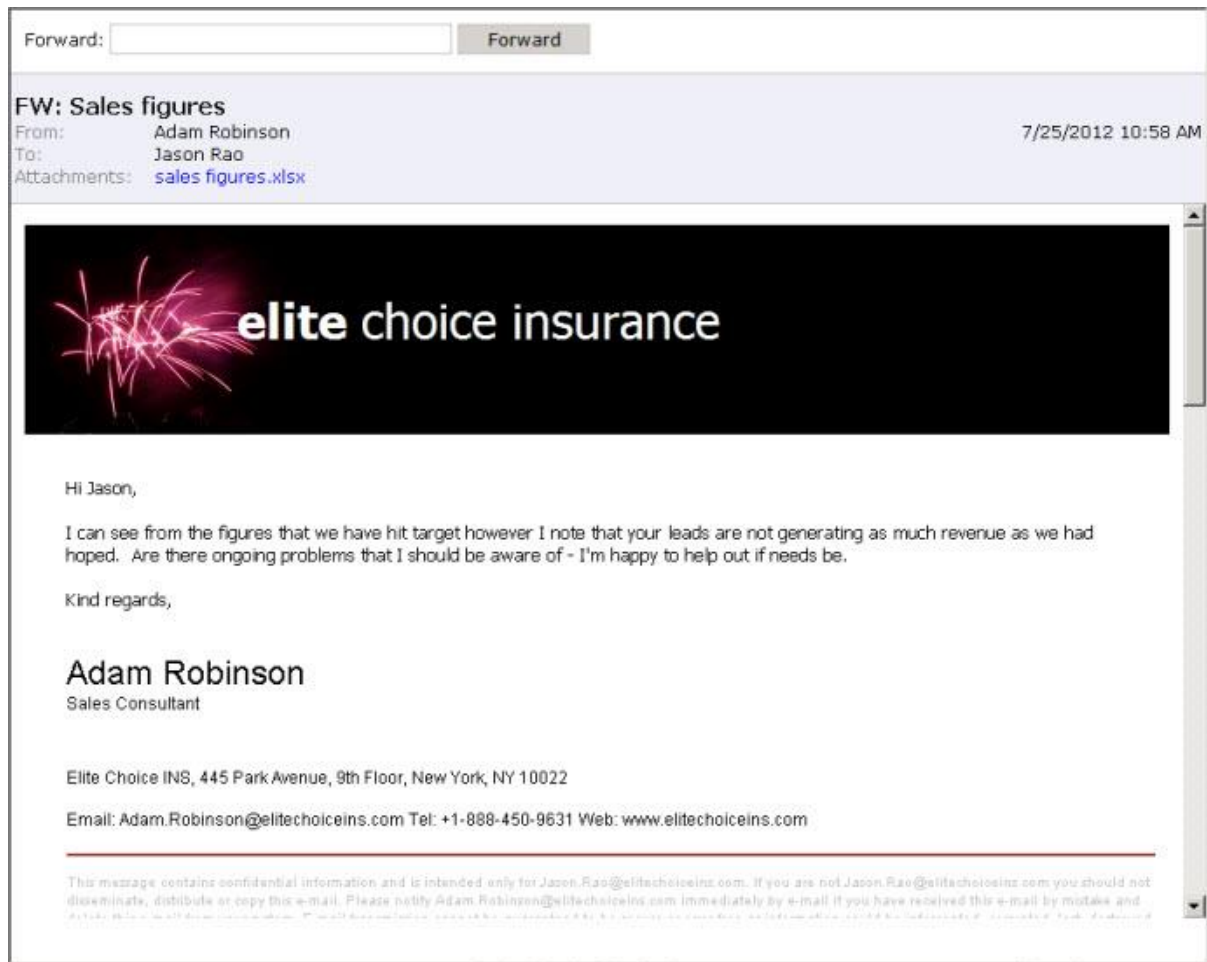
- Click the [advanced](#) [pg.213] link to access options to perform a more specific search.
- Click an entry to [view its content in a separate window](#) [pg.215] and access a [forwarding](#) option.

NOTE

If more than one **archive store** has been defined, all stores (for which you have associated [access permissions](#) [pg.121]) will be searched. A search can be restricted to a specific store name using **console** search or **rich web** search features.

Viewing an Archived Message (Light UI)

Having performed a [lightweight](#) search to display a list of results, select any message to view its content in a new window:



Forwarding a Message

To forward a message, simply enter the required email address in the [forward](#) field and click the [forward](#) button:

Forward:

FW: Sales figures
From: Adam Robinson
To: Jason Rao
Attachments: sales figures.xlsx

7/25/2012 10:58 AM

elite choice insurance

Hi Jason,

I can see from the figures that we have hit target however I note that your leads are not generating as much revenue as we had hoped. Are there ongoing problems that I should be aware of - I'm happy to help out if needs be.

Kind regards,

Adam Robinson
Sales Consultant

Elite Choice INS, 445 Park Avenue, 9th Floor, New York, NY 10022
Email: Adam.Robinson@elitechoiceins.com Tel: +1-888-450-9631 Web: www.elitechoiceins.com

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When a message is forwarded, a new message is created and the message shown is attached to it (i.e. the forwarded message will be [from](#) the user who has performed the search and chosen to forward the message). To achieve this, [Exclaimer Mail Archiver](#) needs access to the [Exchange Web Services URL](#), as defined in [Mail Archiver settings](#) [pg.45].

Supported File Types

The following file formats will be 'crawled' by [Exclaimer Mail Archiver](#) when found as email attachments:

- Adobe Acrobat (*.pdf)
- Adobe Framemaker MIF (*.mif)
- Ami Pro (*.sam)
- Ansi Text (*.txt)
- ASCII Text
- ASF media files (metadata only) (*.asf)
- CSV (Comma-separated values) (*.csv)
- DBF (*.dbf)
- EBCDIC
- EML files (emails saved by Outlook Express) (*.eml)
- Enhanced Metafile Format (*.emf)
- Eudora MBX message files (*.mbx)
- Flash (*.swf)
- GZIP (*.gz)
- HTML (*.htm, *.html)
- JPEG (*.jpg)
- Lotus 1-2-3 (*.123, *.wk?)
- MBOX email archives (including Thunderbird) (*.mbx)
- MHT archives (HTML archives saved by Internet Explorer) (*.mht)
- MIME messages
- MSG files (emails saved by Outlook) (*.msg)
- Microsoft Access MDB files (see note 1) (*.mdb, *.accdb, including Access 2007 and Access 2010)
- Microsoft Document Imaging (*.mdi)
- Microsoft Excel (*.xls)
- Microsoft Excel 2003 XML (*.xml)
- Microsoft Excel 2007 and 2010 (*.xlsx)
- Microsoft Outlook data files (*.PST)
- Write (*.wri)
- XBase (including FoxPro, dBase, and other XBase-compatible formats) (*.dbf)
- XML (*.xml)
- Microsoft Outlook/Exchange Messages, Notes, Contacts, Appointments, and Tasks (See note 2)
- Microsoft Outlook Express 5 and 6 (*.dbx) message stores
- Microsoft PowerPoint (*.ppt)
- Microsoft PowerPoint 2007 and 2010 (*.pptx)
- Microsoft Rich Text Format (*.rtf)
- Microsoft Searchable Tiff (*.tiff)
- Microsoft Word for DOS (*.doc)
- Microsoft Word for Windows (*.doc)
- Microsoft Word 2003 XML (*.xml)
- Microsoft Word 2007 and 2010 (*.docx)
- Microsoft Works (*.wks)
- MP3 (metadata only) (*.mp3)
- Multimate Advantage II (*.dox)
- Multimate version 4 (*.doc)
- OpenOffice versions 1, 2, and 3 documents, spreadsheets, and presentations (*.sxc, *.sxd, *.sxi, *.sxw, *.sxc, *.stc, *.sti, *.stw, *.stm, *.odt, *.ott, *.odg, *.otg, *.odp, *.otp, *.ods, *.ots, *.odf) (includes OASIS Open Document Format for Office Applications)
- Quattro Pro (*.wb1, *.wb2, *.wb3, *.qpw)
- QuickTime (*.mov, *.m4a, *.m4v)
- RAR (*.rar)
- TAR (*.tar)
- TIFF (*.tif)
- TNEF (winmail.dat files)
- Treepad HJT files (*.hjt)
- Unicode (UCS16, Mac or Windows byte order, or UTF-8)
- Visio XML files (*.vdx)
- Windows Metafile Format (*.wmf)
- WMA media files (metadata only) (*.wma)
- WMV video files (metadata only) (*.wmv)
- WordPerfect 4.2 (*.wpd, *.wpf)

- XML Paper Specification (*.xps)
- XSL
- XyWrite
- ZIP (*.zip)
- WordPerfect (5.0 and later) (*.wpd, *.wpf)
- WordStar version 1, 2, 3 (*.ws)
- WordStar versions 4, 5, 6 (*.ws)
- WordStar 2000

Chapter 10

Journal Mailbox Importers

Introduction

Microsoft Exchange has built in functionality for [journaling](#). [Journaling](#) is the process of taking a copy of email messages and placing the copies into a mailbox that has been designated as a [journaling mailbox](#). When email messages are copied to the [journaling mailbox](#), they are copied in a special format with the original message attached to a [journal report](#); these messages cannot be viewed as with a standard mailbox. Most organisations tend to have a single [journaling mailbox](#) however it is possible for multiple [journaling mailboxes](#) to be configured.

[Exclaimer Mail Archiver](#) draws upon this functionality to provide a robust, easily accessible archive of all messages (or defined subsections of email). By default, the [Exclaimer Mail Archiver](#) service polls [Exchange journaling mailboxes](#) continuously, extracting messages and pushing them through the [Exclaimer rules engine](#). Here, any [archiving policies](#) [pg.61] are processed to determine which [archive store](#) [pg.110] each message will go to.

When messages are archived, they are 'unpacked' from the special [journaling mailbox](#) format and presented in a readable form when a [search](#) [pg.177] is performed. Users with appropriate permissions can also [view properties](#) [pg.193] associated with each message - for example, to whom the message was delivered.

To achieve all of this, [Exclaimer Mail Archiver](#) needs to know:

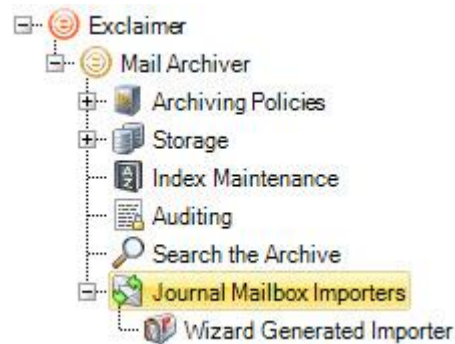
- Which [Exchange journaling mailboxes](#) to poll - a [journal mailbox importer](#) should be [added](#) [pg.230] for each [Exchange journaling mailbox](#).
- How often polling should occur - define [settings](#) [pg.225] for each [journal mailbox importer](#) that is added.
- How to handle messages that are not archived for a range of reasons - use folder management options to manage these cases.

NOTE

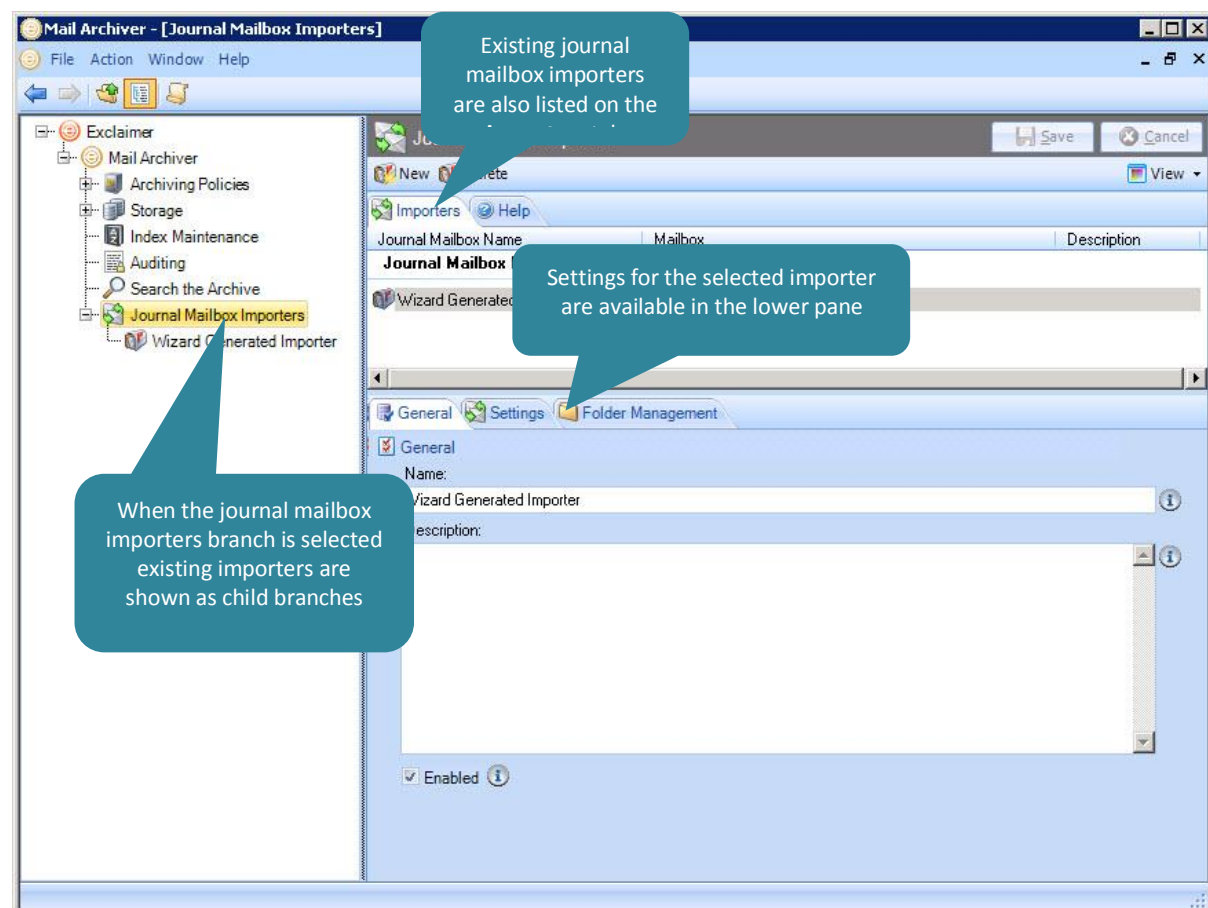
Email messages are removed from the Exchange journal mailbox when they are processed by Exclaimer Mail Archiver. If a message cannot be archived to a [store](#) [pg.110] (typically because it does not meet criteria specified in any defined policies) it is moved to an appropriate sub folder within the original journal mailbox. For further information about these sub folders please refer to the [folder management](#) [pg.227] section.

Accessing Journal Mailboxes

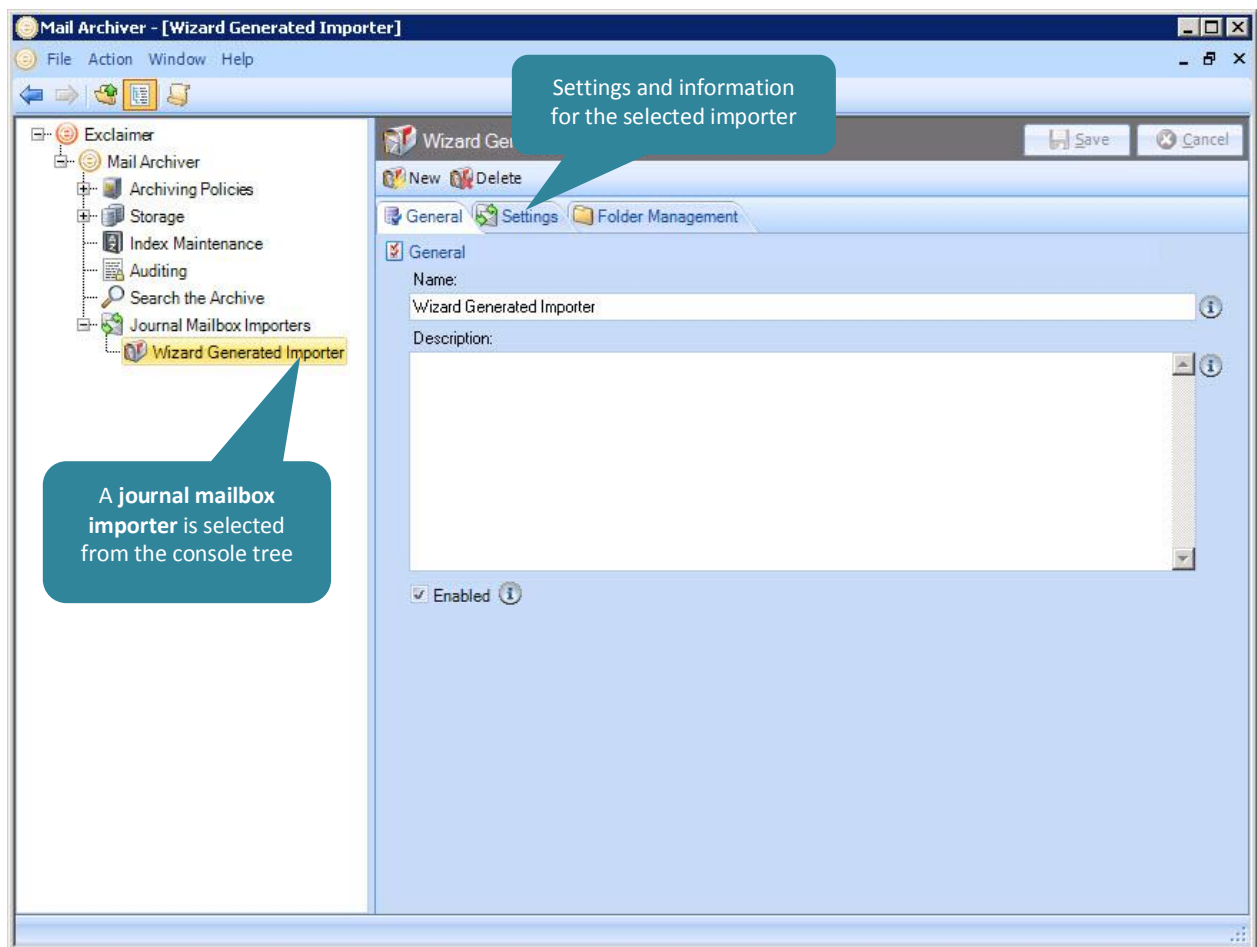
Within [Exclaimer Mail Archiver](#), [journal mailbox importers](#) are accessed via the [journal mailbox importers](#) branch of the [console tree](#) [pg.31]:



When the [journal mailbox importers](#) branch is selected, all existing [journal mailbox importers](#) are displayed on the [importers](#) tab:



Alternatively, a [journal mailbox importer](#) can be selected directly from the [console tree](#):



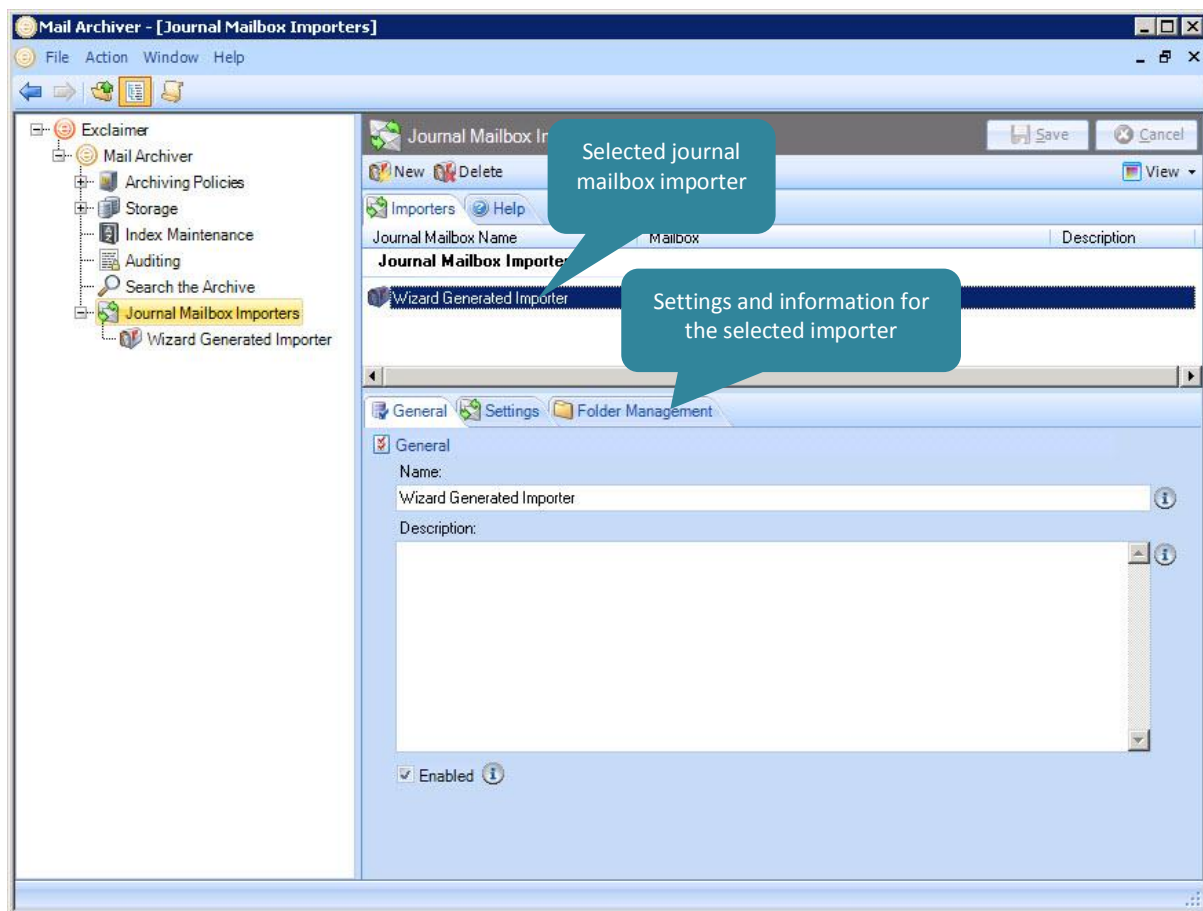
The list of importers can also be accessed by selecting the [manage journal mailboxes](#) option from the [actions](#) pane.

Each [journal mailbox importer](#) is associated with its own [general](#) [pg.224] information, [settings](#) [pg.225] and also [folder management](#) [pg.227] options (which are used to handle messages that are not - or cannot be - archived).

Journal Mailbox Importer

Settings and Information

Each [journal mailbox importer](#) is associated with its own [settings](#) [pg.225] and [folder management](#) [pg.227] options, so you can define account credentials for accessing the [journal mailbox](#), polling frequency and how to handle messages that are not - or cannot be - archived. These options are available when a [journal mailbox importer](#) is selected (either from the [console tree](#) [pg.31] or within the [importers tab](#) [pg.221]):

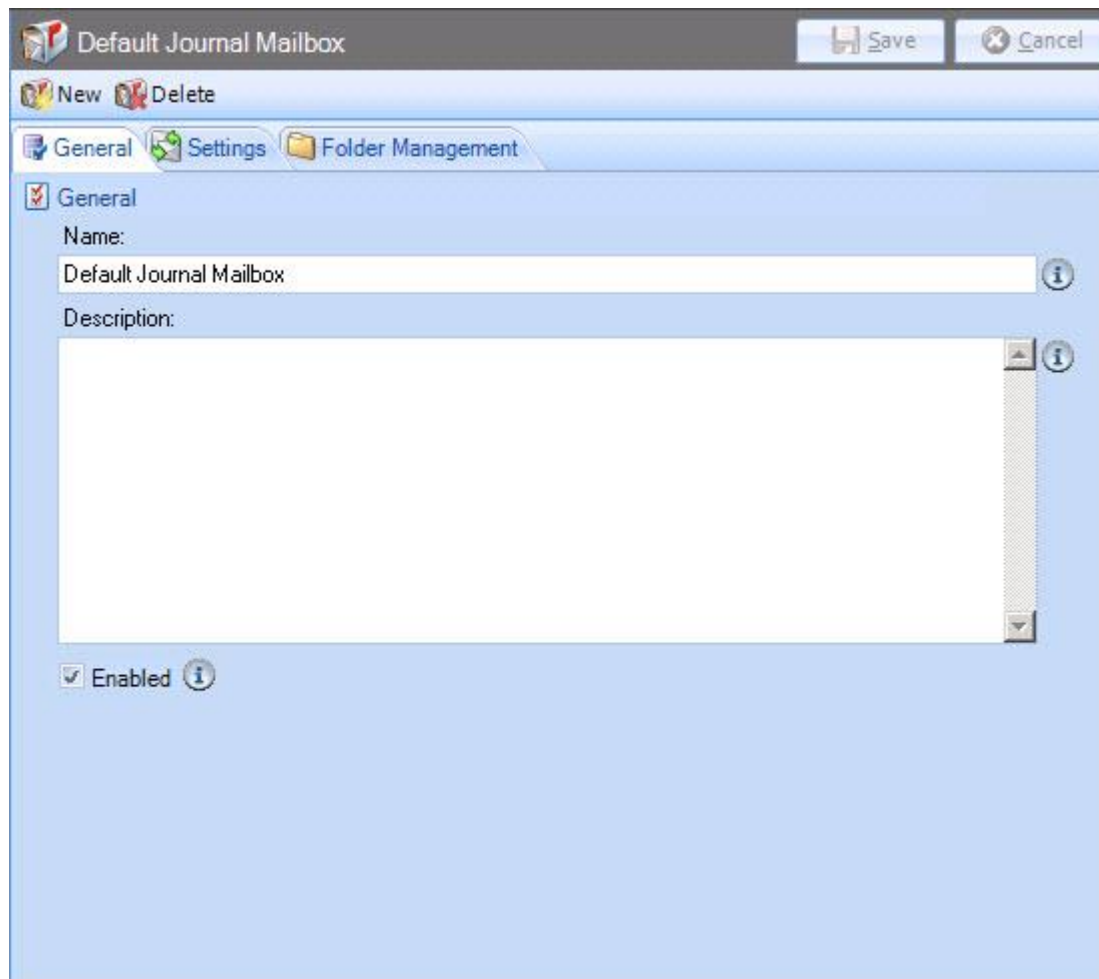


From here:

- The [general](#) [pg.115] tab is used to define basic name and descriptive information for the [journal mailbox importer](#).
- The [settings](#) [pg.225] tab is used for key settings such as account credentials and polling frequency.
- The [folder management](#) [pg.227] tab is used to determine how to handle messages that are not - or cannot be - archived.

Journal Mailbox Importer - General

Options on the [general](#) tab are used to define basic information for the [journal mailbox importer](#). These settings determine how the [importer](#) is displayed throughout the system and whether or not it is enabled:

The screenshot shows a window titled "Default Journal Mailbox" with a standard Windows-style title bar containing "Save" and "Cancel" buttons. Below the title bar is a toolbar with "New" and "Delete" icons. A tabbed interface shows three tabs: "General" (selected), "Settings", and "Folder Management". Under the "General" tab, there is a "General" section with a checked checkbox. Below this, the "Name:" field contains the text "Default Journal Mailbox" and has an information icon (i) to its right. The "Description:" field is a large text area with a scrollbar and also has an information icon (i) to its right. At the bottom of the section, there is a checked checkbox labeled "Enabled" with an information icon (i) to its right.

Options on this tab are summarized below:

Option	Summary
Name	Each journal mailbox importer must have a unique name. The name entered here is displayed in the Exclaimer console tree [pg.31] , and in the importers list [pg.221] .
Description	This field can be used to add any useful information for the journal mailbox importer - for example, usage notes, version history, background or explanatory information. The first line of description text is displayed in any importers list [pg.221] (but not the console tree).
Enabled	This check box must be enabled for Exclaimer Mail Archiver to process messages from the selected journal mailbox . If you wish to stop archiving messages for a journal mailbox , this option can be de-selected.

Journal Mailbox Importer - Settings

Each [journal mailbox importer](#) is associated with settings for account credentials and polling frequency. Having [selected an importer](#) [pg.221], these options are available on the [settings](#) tab:

The screenshot shows the 'Default Journal Mailbox' settings window with the 'Settings' tab selected. The window has a title bar with 'Default Journal Mailbox', 'Save', and 'Cancel' buttons. Below the title bar are 'New' and 'Delete' buttons. The 'Settings' tab is active, showing the 'Exchange Journal Mailbox' section. This section includes fields for 'Account' (set to 'Journal') and 'Password' (masked with dots), both with information icons. A 'Test Connectivity' button is to the right of the password field. Below these are two radio button options: 'Autodiscover the Exchange Web Services URL (Recommended)' (selected) and 'Use this URL for Exchange Web Services:' (with an empty text field and an information icon). The 'Polling Schedule' section at the bottom has two radio button options: 'Continuous' (selected) and 'Check for new messages every:' (with a time picker showing 0 Days, 0 Hours, 0 Minutes, and 0 Seconds, plus an information icon).

Default Journal Mailbox [Save] [Cancel]

New Delete

General Settings Folder Management

Exchange Journal Mailbox [Learn more about Exchange journaling](#)

Account: Journal ... ⓘ Test Connectivity

Password: ⓘ

☒ Autodiscover the Exchange Web Services URL (Recommended) ⓘ

☐ Use this URL for Exchange Web Services: ⓘ

Polling Schedule

☒ Continuous

☐ Check for new messages every:

0 Days 0 Hours 0 Minutes 0 Seconds ⓘ

Options on this tab are summarized below:

Option	Summary
Exchange Journal Mailbox > Account / Password	Enter the user account name and corresponding password for the account with access permissions for the Exchange journal mailbox . Use the test connectivity button to check that specified credentials can access the journal mailbox .
Exchange Journal Mailbox > Autodiscover the Exchange Web Services URL	<p>The Exchange Web Services URL tells the system where to find the required journal mailbox. The specified URL enables Exclaimer Mail Archiver to:</p> <ul style="list-style-type: none"> • Connect to the journal mailbox • Login (with account name and password) specified • Read, write, delete and move messages from this mailbox to defined archive store(s) <p>On a correctly configured system, this URL is easily found using autodiscover (a Microsoft technology). However, for particularly complex or incorrectly configured systems, autodiscover may not work and so details must be entered manually.</p> <div> <div>NOTE</div> <p>Note that an Exchange Web Services URL is also defined within Mail Archiver settings [pg.45]. For many organizations, this URL will be the same in both cases, however they are defined separately for different tasks.</p> </div>
Exchange Journal Mailbox > Use this URL for Exchange Web Services	If the autodiscover option fails to detect the correct URL for Exchange Web Services , select this radio button and enter the required URL in the associated field.
Polling Schedule > Continuous	In order to archive messages, Exclaimer Mail Archiver polls Exchange journal mailboxes for email messages and then processes them accordingly. If the polling schedule is set to continuous , the journal mailbox will be continually checked for new messages to process.
Polling Schedule > Check for New Messages Every...	If you use multiple journal mailboxes where some are used less often than others, you might decide to poll for messages less frequently. Here, specify the number of days and/or hours and/or minutes and/or seconds that polling should take place.

Journal Mailbox Importer - Folder Management

There may be instances where [Exclaimer Mail Archiver](#) cannot archive an email message - most often this will be because a message does not match any [conditions](#) [pg.68] defined in [archiving policies](#) [pg.61], or it triggers a [policy exception](#) [pg.76], but there may also be cases where archiving does not take place due to a hardware/network failure or a malformed message.

To handle these cases, [Exclaimer Mail Archiver](#) creates a number of sub folders within the [Exchange journal mailbox](#) automatically. Un-archived messages are moved out of the [Exchange journal mailbox](#) and into these sub folders. At any time, users with appropriate permissions can log into [Outlook](#) and see these sub folders, summarized below:

Folder	Summary
No policies applied	This folder is used to store any messages which are processed by Exclaimer Mail Archiver but no archiving policy [pg.61] was applied - i.e. the message did not match any of the criteria defined in any policy .
Policy exception	This folder is used to store any messages which have triggered a policy exception [pg.76] rather than a condition . For example, if a policy is defined to archive all email messages except those with [SPAM] in the subject line (and to stop processing after the policy is applied), any messages with [SPAM] in the subject line would be stored in this folder.
Unable to archive	This folder stores any messages which could not be written to an archive store because of a problem - for example, a network error or perhaps a permissions conflict.
Bad Message	This folder stores messages which are malformed and could not be read by Exclaimer Mail Archiver .
Non Journal	This folder is used for cases where the journal mailbox contains something that is not a journal message - for example, where a user has inadvertently sent an email to the Journal user.

The [folder management](#) tab is used to determine how these folders are maintained for a [journal mailbox importer](#):

Wizard Generated Importer

New Delete

General Settings Folder Management

Journal Mailbox Folder Management

Create an Event Log warning entry:

- ☒ if the number of messages in the "No Policies Applied" folder exceeds 500
- ☒ if the number of messages in the "Policy Exception" folder exceeds 500
- ☒ if the number of messages in the "Unable to Archive" folder exceeds 500
- ☒ if the number of messages in the "Bad Message" folder exceeds 500
- ☒ if the number of messages in the "Non Journal" folder exceeds 500

Stop the Journal Access service:

- ☒ if the number of messages in the "No Policies Applied" folder exceeds 500
- ☒ if the number of messages in the "Policy Exception" folder exceeds 500
- ☒ if the number of messages in the "Unable to Archive" folder exceeds 500
- ☒ if the number of messages in the "Bad Message" folder exceeds 500
- ☒ if the number of messages in the "Non Journal" folder exceeds 500

Automatically delete messages:

- ☒ from the "No Policies Applied" folder if they are older than 30 days
- ☒ from the "Policy Exception" folder if they are older than 30 days
- ☒ from the "Unable to Archive" folder if they are older than 30 days
- ☒ from the "Bad Message" folder if they are older than 30 days
- ☒ from the "Non Journal" folder if they are older than 30 days

Automatically retry messages:

- ☒ in the "No Policies Applied" folder every 500 minutes
- ☒ in the "Unable to Archive" folder every 500 minutes

If these sub folders contain large numbers of email messages, it is likely that [archiving policies \[pg.61\]](#) have not been defined effectively or perhaps that there is an underlying system problem. Here, thresholds are set to trigger different actions for each sub folder, as summarized below:

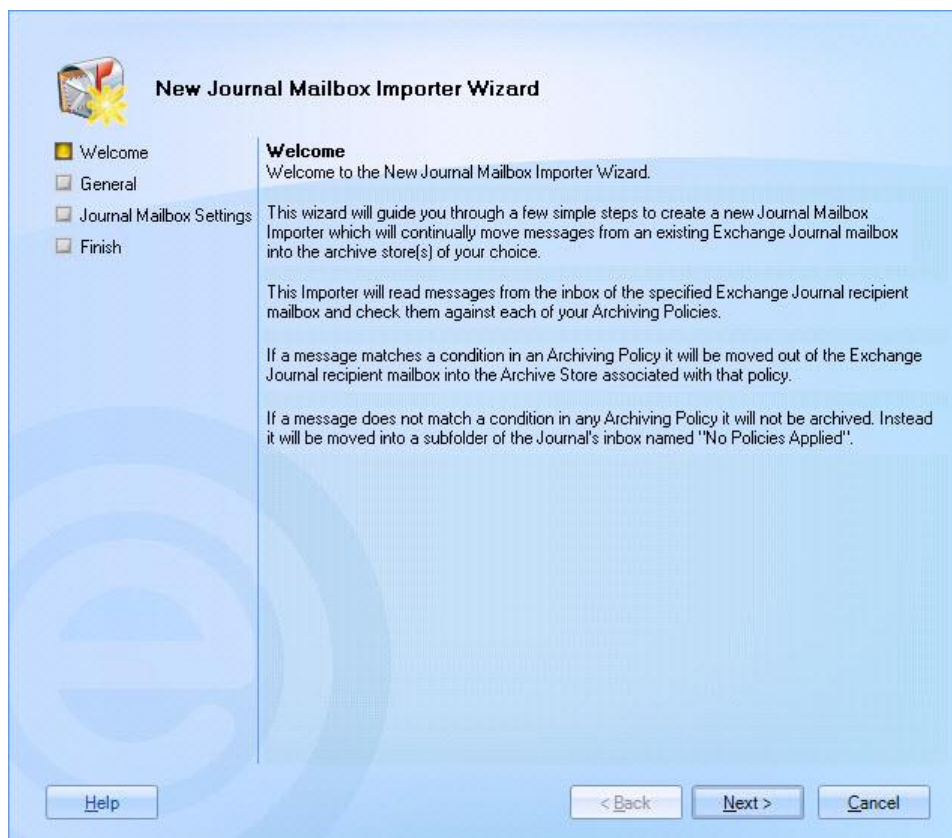
Action	Summary
Create an Event Log Warning Entry	For each sub folder, specify the message quantity threshold above which an event log entry will be triggered. For example, if the number of messages is set to 500, an entry will be added to the event log when the quantity of messages in the associated sub folder reaches 501.
Stop the Journal Access Service	For each sub folder, specify the message quantity threshold above which access to the journal mailbox will be denied - i.e. no further messages will be processed for the mailbox.
Automatically Delete Messages	For each sub folder, specify the message quantity threshold above which messages in the sub folder will be deleted.

The last two options on this tab are used to define the frequency with which [Exclaimer Mail Archiver](#) should attempt to process messages in the no policies applied and [unable to archive](#) sub folders again. It is important to retry these messages in case [archiving policies \[pg.61\]](#) have been [added \[pg.86\]](#) or [amended \[pg.92\]](#), or underlying system problems have been resolved.

Adding a New Journal Mailbox Importer

To add a new [journal mailbox importer](#), follow the steps below:

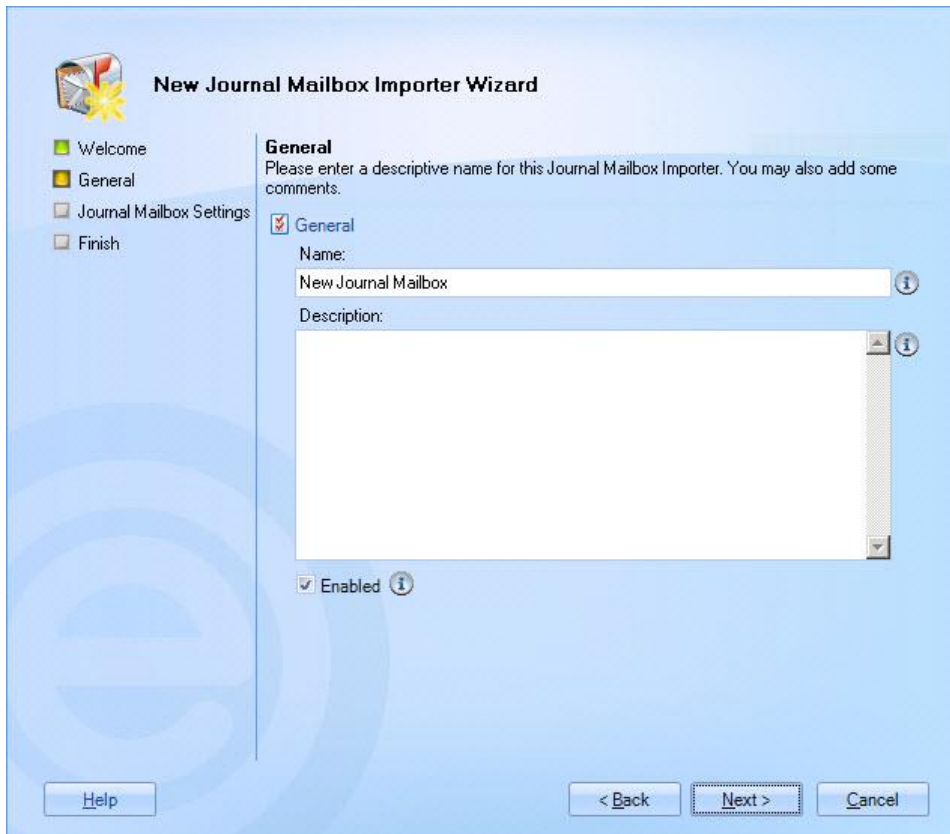
1. Select the [journal mailbox importers](#) branch of the [console tree](#) [pg.31]. All existing [journal mailbox importers](#) are displayed in the [importers](#) tab.
2. Select the [new](#) option from the toolbar to launch the [journal mailbox importer wizard](#) at the [welcome](#) page:



NOTE

Alternatively, you can select the **new journal mailbox importer...** option from the [actions pane](#) [pg.36] to launch the **new journal mailbox importer wizard**.

3. Click [next](#) to access [general](#) details for the new importer:



New Journal Mailbox Importer Wizard

■ Welcome
■ **General**
■ Journal Mailbox Settings
■ Finish

General
Please enter a descriptive name for this Journal Mailbox Importer. You may also add some comments.

☒ General

Name:
New Journal Mailbox

Description:

☒ Enabled

Help < Back Next > Cancel

4. Enter the required [name](#) for the importer (the name entered here is displayed throughout the system) and, if required, add any comments in the [description](#) field.

5. Click **next** to access **settings** for the importer. Here, the name of the required **Exchange journal mailbox** is required, together with the associated password:

New Journal Mailbox Importer Wizard

Welcome
General
Journal Mailbox Settings
Finish

Journal Mailbox Settings
Please select the Mailbox that you have configured as an Exchange Journal recipient.
[Learn more about Exchange Journaling](#)

Mailbox:

Password:

Help < Back Next > Cancel

NOTE

An **Exchange journal mailbox** can only be used once. If you have already defined a **journal mailbox importer** with an **Exchange journal mailbox**, you must [remove that journal mailbox importer \[pg.234\]](#) first.

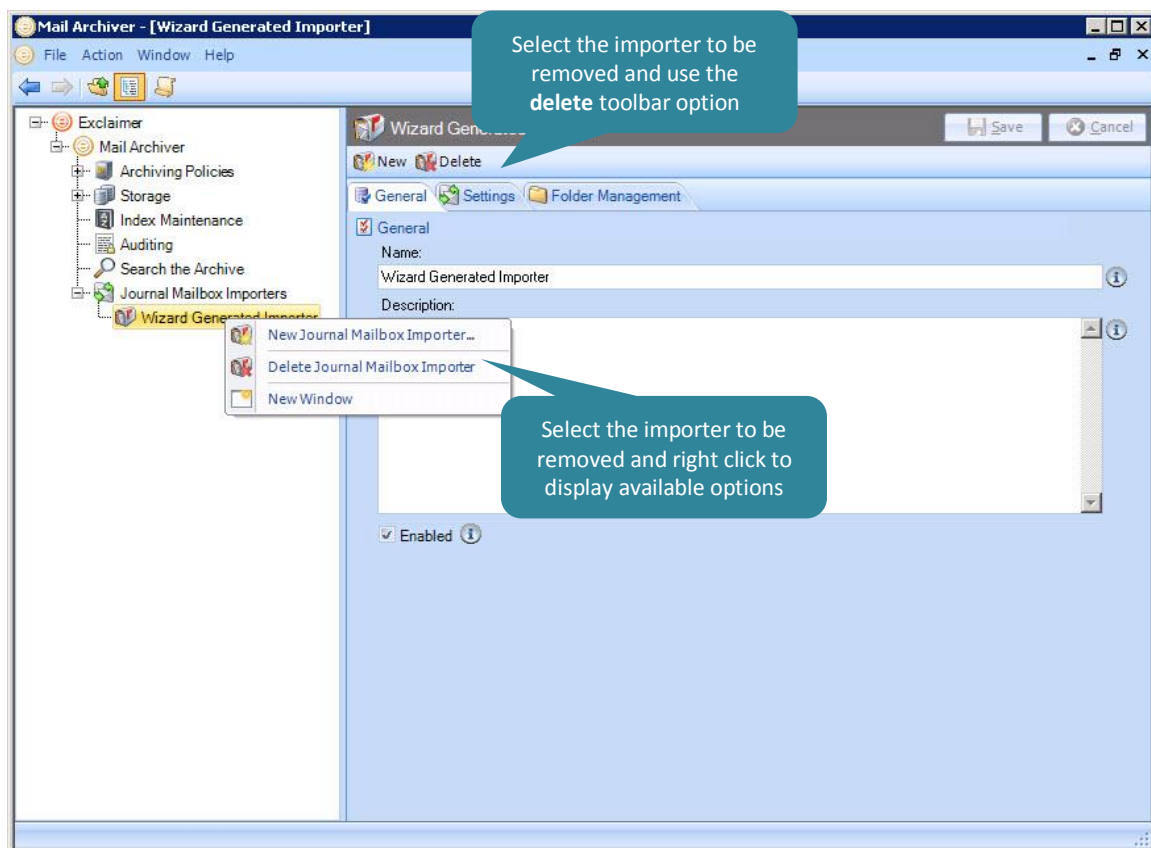
6. Enter the required [Exchange journal mailbox](#) name and password, then click [next](#) to complete the wizard:



7. Click [finish](#) to exit back to the [Exclaimer console](#) [pg.31]. The new [journal mailbox importer](#) is added to the console tree and will start processing messages as soon as changes are saved.
8. Click [save](#) at the top of the console window to save changes.

Removing a Journal Mailbox Importer

To remove an existing [journal mailbox importer](#), select the required importer (either from the [console tree](#) [pg.35] or from the [importers tab](#) [pg.221]). Then, either right click and select [delete](#) from the context menu, or click the [delete](#) button on the toolbar:



Having chosen to delete a [journal mailbox importer](#), you are asked [are you sure you want to delete this journal mailbox importer?](#) Click [yes](#) to confirm the deletion or [no](#) to abandon the task. Finally, click [save](#) to save changes.

Removing a [journal mailbox importer](#) from [Exclaimer Mail Archiver](#) prevents the product from archiving any messages from that mailbox. However, [Microsoft Exchange](#) will continue to journal messages to this mailbox as the [journal rule](#) will not be removed automatically. As such, you may want to remove the mailbox or disable the [journaling rule](#) using the [Microsoft Exchange Management Console](#).

NOTE

A **journal mailbox importer** is not permanently removed until settings have been saved. If you exit without saving (or if you **cancel** changes), the **journal mailbox importer** will be reinstated in the console tree.

Manual Configuration & Setup of Journal Mailboxes

Having run the [installation \[pg.19\]](#) and [first use \[pg.23\]](#) wizards, required setup for [journal mailboxes \[pg.220\]](#) is typically completed automatically. However, there are occasions (for example, with more complex systems) where an administrator may need to check or complete this setup manually.

The following sections detail the manual setup and configuration for journal mailboxes:

- [Configuring the Exclaimer Mailbox Access Service \[pg.236\]](#)
- [Configuring a Journal Mailbox \[pg.240\]](#)
- [Configuring Microsoft Exchange Journaling \[pg.244\]](#)

Configuring the Exclaimer Mailbox Access Service

Within [Exclaimer Mail Archiver](#), Exchange mailbox access can be configured via [Mail Archiver settings](#) [pg.45] however, if you need to do this manually for any reason, the following steps should be completed:

1. [Create a user](#), see below
2. [Grant rights](#) [pg.237]
3. [Configure the service to use new credentials](#) [pg.239]

These steps are detailed in the following sections. Note that these steps must be completed on your [Microsoft Exchange server](#). This may not be the computer where [Exclaimer Mail Archiver](#) is installed.

Step 1: Create a User

There are two possible ways to create a new user - use ONE of the methods detailed below.

Use Exchange Management Console

A new user can be created by completing a [Microsoft Exchange wizard](#):

1. From [Microsoft Exchange](#), select [recipient configuration > mailbox > new mailbox](#)
2. Set [user mailbox](#) as a mailbox type.
3. Having completed this wizard, it is advisable to hide the new mailbox from the [Global Address List](#) (this ensures that people will not be able to see this user from their email clients). To do this, run the following script:

```
Set-Mailbox -HiddenFromAddressListsEnabled $true -Identity "### Enter  
The Users Identity ###"
```

NOTE

Note that elements surrounded by '### ... ###' should be substituted with information as indicated - remove the hash (#) symbols and maintain spacing. Please also refer to [additional guidelines for creating a new user](#) [pg.237].

Use a PowerShell Script

The following script can be run in the [Exchange Management Shell](#):

```
New-Mailbox -Name "### Enter a username ###" -UserPrincipalName "### Enter the domain username ###" -ResetPasswordOnNextLogon $false -Database "### Enter the Mailbox Database ###"

Set-Mailbox -HiddenFromAddressListsEnabled $true -Identity "### Enter The Users Identity ###"
```

This script will create the user and hide the new mailbox from the [Global Address List](#). Please also refer to [additional guidelines for creating a new user](#) [pg.237].

NOTE

Note that elements surrounded by '### ... ###' should be substituted with information as indicated - remove the hash (#) symbols and maintain spacing. Please also refer to [additional guidelines for creating a new user](#) below.

Additional Guidelines for Creating a New User

The following guidelines should be considered when creating a new user using either of the methods described above:

- The user should have no password expiration policy (i.e. the password should never expire).
- The user should NOT be a member of [Domain Admins](#) or [Enterprise Admins](#) groups, since they are explicitly denied access to Exchange mailboxes by default Exchange settings.
- The user should have [LogonAsService](#) rights (these will be granted if necessary during [step 3](#) [pg.239]).
- Care should be taken when creating this user because it will have full access to email for all users on the Exchange server.

Step 2: Grant Rights

PowerShell scripts are provided below to grant rights. If you have a mixed environment which includes both [Exchange 2007](#) and [Exchange 2010](#) (or above) machines, the appropriate script should be run on one of each type. In other words, the [Exchange 2007](#) script should be run on [Exchange 2007](#) and the [Exchange 2010](#) script should be run on [Exchange 2010](#) (or above).

If you have added a new [Exchange 2007](#) server or new [Exchange 2007](#) database to the existing infrastructure, the script will need to be run again to grant necessary rights to new servers or databases (the same applies to [Exchange 2010](#) or above).

Exchange 2007

If you are using [Exchange 2007](#), use the [Grant Exchange Rights](#) script below:

```
Get-ExchangeServer | where {$_.IsClientAccessServer -eq $true} | where
{$_.IsValid -eq $true} | where {$_.IsExchange2007OrLater -eq $true} |
where { $_.AdminDisplayVersion.Major -eq 8 } | ForEach-Object {Add-
ADPermission -Identity $_.distinguishedname -User (Get-User -Identity "###
Enter The Users Identity ###" | select-object).identity -accessRights
GenericRead, GenericWrite -extendedRights Send-As, Receive-As, ms-Exch-
Store-Admin, ms-Exch-EPI-Impersonation -InheritanceType All }
Get-MailboxDatabase | ForEach-Object {Add-ADPermission -Identity
$_DistinguishedName -User (Get-User -Identity "### Enter The Users
Identity ###" | select-object).identity -ExtendedRights ms-Exch-EPI-May-
Impersonate}
Get-MailboxDatabase | Add-ADPermission -User '### Enter The Users Identity
###' -AccessRights GenericAll -InheritanceType All
```

Exchange 2010

If you are using [Exchange 2010](#) (or above), use the [Grant Exchange Rights](#) script below:

```
$ExchangeServer = Get-ExchangeServer | where {$_.IsClientAccessServer -eq
$true} | where {$_.IsValid -eq $true} | where {$_.IsExchange2007OrLater -
eq $true} | where { $_.AdminDisplayVersion.Major -ge 14 }
$ExchangeServer | ForEach-Object { New-ManagementRoleAssignment -Role
ApplicationImpersonation -User (Get-User -Identity "### Enter The Users
Identity ###" | select-object).identity }
Get-MailboxDatabase | Add-ADPermission -User '### Enter The Users Identity
###' -AccessRights GenericAll -InheritanceType All
```

NOTE

Note that elements surrounded by ‘### ... ###’ should be substituted with information as indicated - remove the hash (#) symbols and maintain spacing.

Step 3: Configure the Service to Use Credentials

There are two possible ways to configure the service to use new credentials - use ONE of the methods described below.

Use the Services Applet

1. Access the [Services](#) applet ([Control Panel](#) > [Administrative Tools](#) > [Services](#)).
2. Locate the [Exclaimer Mail Archiver Exchange Access](#) service.
3. Right click on this service and select [Properties](#).
4. Select the [log on](#) tab.
5. Click the [browse](#) button and locate the user created in [step 1](#) [pg.236].
6. Type the user's password and click [OK](#) to complete the process.
7. Ensure that the service starts with the new user's credentials and that its startup type is set to [automatic](#).

Use a PowerShell Script

The following script can be run in the [Exchange Management Shell](#).

Exchange 2007

If you are using [Exchange 2007](#), use the [Set Service Rights](#) script below:

```
Get-WMIObject Win32_Service | where { $_.Name -eq "Exclaimer Mail Archiver Exchange Access Service"} | ForEach-Object { $_.Change($null, $null, $null, $null, "Automatic", $null, "### Enter the domain username ###", password) }  
Restart-Service "Exclaimer Mail Archiver Exchange Access Service"
```

Exchange 2010

If you are using [Exchange 2010](#) (or above), use the [Set Service Rights](#) script below:

```
Get-WMIObject Win32_Service | where { $_.Name -eq "Exclaimer Mail Archiver Exchange Access Service"} | ForEach-Object { $_.Change($null, $null, $null, $null, "Automatic", $null, "### Enter The Users Identity ###", password) }  
Restart-Service "Exclaimer Mail Archiver Exchange Access Service"
```

NOTE

Note that elements surrounded by '### ... ###' should be substituted with information as indicated - remove the hash (#) symbols and maintain spacing. Also note that the instance of **password** should be replaced with the appropriate password for the user account.

Configuring a Journal Mailbox

Having [installed](#) [pg.19] Exclaimer Mail Archiver and run the [first use wizard](#) [pg.23], options are available to select a [journal mailbox](#) - i.e. to define which [Exchange journal mailbox](#) should be monitored and archived. Any configured journal mailboxes are available for selection during the installation and setup process, and then within [journal mailbox importer settings](#) [pg.225] once Exclaimer Mail Archiver is run.

This section explains how to configure a [journal mailbox](#) manually, if required. In this case, the following steps should be completed:

1. [Create a user](#) [pg.240]
2. [Configure Microsoft Exchange to journal messages to this account](#) [pg.242]

These steps are detailed in the following sections. Note that these steps must be completed on your [Microsoft Exchange server](#). This may not be the computer where Exclaimer Mail Archiver is installed.

Step 1: Create a User

There are two possible ways to create a new user - use ONE of the methods detailed below.

Use Exchange Management Console

A new user can be created by completing a [Microsoft Exchange](#) wizard:

1. From Microsoft Exchange, select [recipient configuration](#) > [mailbox](#) > [new mailbox](#)
2. Set [user mailbox](#) as a mailbox type.
3. Having completed this wizard, it is advisable to hide the new mailbox from the [Global Address List](#) (this ensures that people will not be able to see this user from their email clients). To do this, run the following script:

```
Set-Mailbox -HiddenFromAddressListsEnabled $true -Identity "### Enter  
The Users Identity ###"
```

NOTE

Note that elements surrounded by '### ... ###' should be substituted with information as indicated - remove the hash (#) symbols and maintain spacing. Please also refer to [additional guidelines for creating a new user](#) [pg.241].

Use a PowerShell Script

The following script can be run in the [Exchange Management Shell](#):

```
New-Mailbox -Name "### Enter a username ###" - UserPrincipalName "###  
Enter the domain username ###" -ResetPasswordOnNextLogon $false -Database  
"### Enter the Mailbox Database ###"  
Set-Mailbox -HiddenFromAddressListsEnabled $true -Identity "### Enter The  
Users Identity ###"
```

NOTE

Note that elements surrounded by '### ... ###' should be substituted with information as indicated - remove the hash (#) symbols and maintain spacing. Please also refer to [additional guidelines for creating a new user \[pg.241\]](#).

This script will create the user and hide the new mailbox from the [Global Address List](#). Please also refer to [additional guidelines for creating a new user \[pg.241\]](#).

Additional Guidelines for Creating a New User

The following guidelines should be considered when creating a new user using either of the methods described above:

- The user should have no password expiration policy (i.e. the password should never expire).
- The user should NOT be a member of [Domain Admins](#) or [Enterprise Admins](#) groups, since they are explicitly denied access to Exchange mailboxes by default Exchange settings.
- The user should have [LogonAsService](#) rights.
- Care should be taken when creating this user because it will have full access to email for all users on the Exchange server.

Step 2: Configure Microsoft Exchange to Journal Messages to this Account

There are two possible ways to configure [Microsoft Exchange](#) to journal messages to the account created in [step 1 \[pg.240\]](#). Use ONE of the methods described below:

- [Use the Exchange Management console](#)
- [Use a PowerShell script](#)

Using the Exchange Management Console

Detailed instructions for using the [Exchange Management console](#) to configure [Microsoft Exchange](#) to journal messages to an account can be found in the [Configuring Microsoft Exchange journaling \[pg.244\]](#).

Using a PowerShell Script

A [PowerShell script](#) can be used to journal:

- Every message processed by your [Exchange Organization](#)
- Messages for a specific [Exchange Mailbox Database](#)

These options are detailed below.

Every Message Processed by your Exchange Organization

The following script can be run in the [Exchange Management Shell](#):

```
New-JournalRule -Name 'Exclaimer Mail Archiver' -JournalEmailAddress '###  
Enter The Users' OU Path and Username ###' -Scope 'Global' -Enabled $True
```

NOTE

Note that elements surrounded by '### ... ###' should be substituted with information as indicated - remove the hash (#) symbols and maintain spacing.

The users' OU path and username will be in the format [domain.local/OU/username](#). For example, [testnet.local/Users/Journal](#).

This script will create the journaling rule and messages will begin to be journaled for every message processed by your [Exchange Organization](#).

Messages for a Specific Exchange Mailbox Database

The following script can be run in the [Exchange Management Shell](#):

```
Set-MailboxDatabase -JournalRecipient ``### Enter The Users' OU Path and  
Username ###' -Identity '### Enter the Mailbox Database Name ###'
```

NOTE

Note that elements surrounded by '### ... ###' should be substituted with information as indicated - remove the hash (#) symbols and maintain spacing.

This script will enable journaling for the specific [Exchange Mailbox Database](#) and messages will begin to be journaled for that specific [Mailbox Database](#) immediately.

Configuring Microsoft Exchange Journaling

Having [installed](#) [pg.19] Exclaimer Mail Archiver and run the [first use wizard](#) [pg.23], options are available to select a [journal mailbox](#) - i.e. to define which [Exchange journal mailbox](#) should be monitored and archived. Any configured journal mailboxes are available for selection during the installation and setup process, and then within [journal mailbox importer settings](#) [pg.225] once Exclaimer Mail Archiver is run.

This section provides instructions for using the [Exchange Management console](#) to configure [Microsoft Exchange](#) to journal messages to an account. You can choose to configure journaling for:

- [All messages](#) [pg.245]
- [Per mailbox database](#) [pg.247]

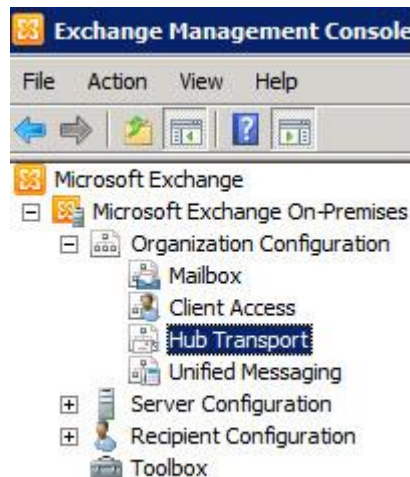
NOTE

Note that this configuration can also be completed using **PowerShell scripts**, if required. For more general information about configuring a journal mailbox in Microsoft Exchange and about using **PowerShell scripts** please refer to the [Configuring a Journal Mailbox](#) [pg.240].

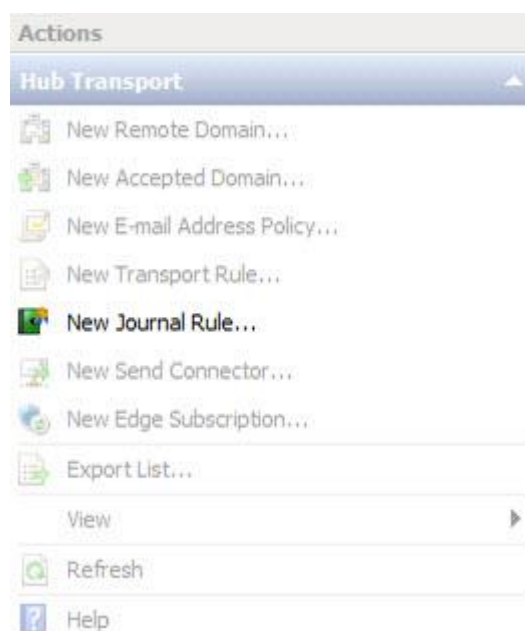
All Messages

To configure [Microsoft Exchange journaling](#) for every message, follow the steps below:

1. Launch [Microsoft Exchange management console](#) from the [Start](#) menu.
2. Select [Microsoft Exchange > organization configuration > hub transport](#) from the tree on the left-hand side:



3. Select [new journal rule...](#) from the [actions](#) pane:



4. Enter a unique descriptive name for your [journal rule](#) and provide the email address for the mailbox you wish to use as the [journal recipient](#):

New Journal Rule

☒ New Journal Rule
☐ Completion

New Journal Rule
This wizard helps you create a new journal rule. When enabled, the new journal rule is executed on your organization's Hub Transport servers.

Rule name:
Exclaimer Mail Archiver

Send Journal reports to e-mail address:
journal@testnet.local [Browse...](#)

Scope:
☒ Global - all messages
☐ Internal - internal messages only
☐ External - messages with an external sender or recipient

☐ Journal messages for recipient:
[Browse...](#)

☒ Enable Rule

To use premium journaling, you must have an Exchange Enterprise Client Access License (CAL).

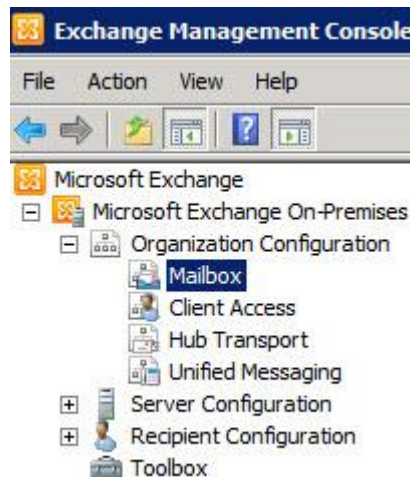
[Help](#) [< Back](#) [New](#) [Cancel](#)

5. Click [new](#) to create your [journal rule](#).
6. Click [finish](#) and all messages processed by your [Microsoft Exchange organization](#) will be journaled to this recipient. You can then use the Journal mailbox to [create a journal mailbox importer in Mail Archiver](#) [pg.230].

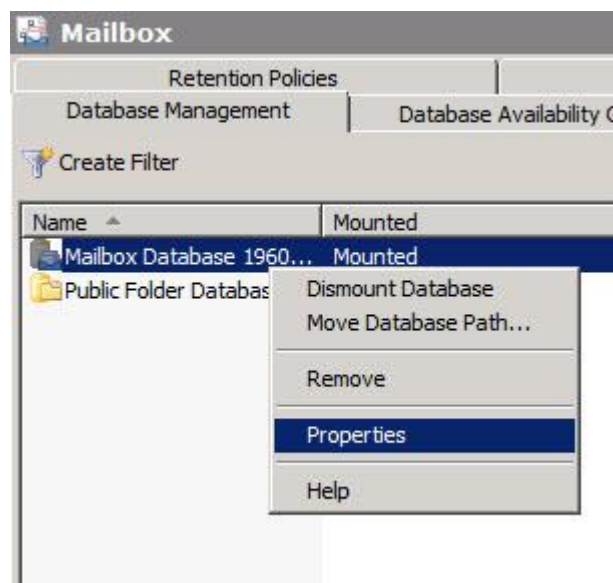
Per Mailbox Database

To configure [Microsoft Exchange journaling](#) for a specific mailbox database, follow the steps below.

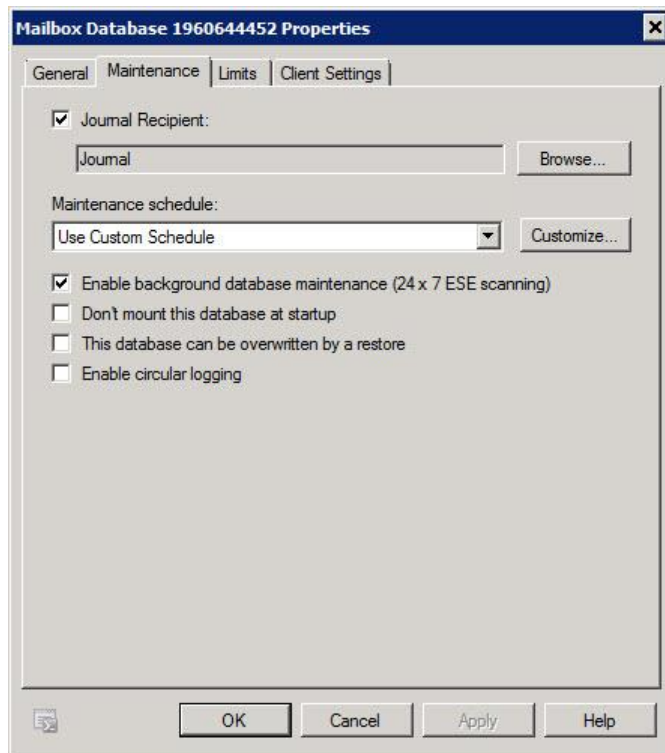
1. Launch [Microsoft Exchange Management console](#) from the [Start](#) menu.
2. Select [Microsoft Exchange > Organization configuration > mailbox](#) from the tree on the left-hand side:



3. Right-click the [mailbox database](#) you wish to enable journaling for and select [properties](#):



4. On the [maintenance](#) tab, enable [journal recipient](#) and - using the [browse](#) button - select the mailbox that you wish to use as the journal mailbox:



5. Click [OK](#). You can then use the journal mailbox to [create a journal mailbox importer in Mail Archiver \[pg.230\]](#).

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